Comhairle Contae Chill Dara
Kildare County Council

# County Kildare Skills Strategy 2024-2030

*in association with*

County Kildare Chamber
Advancing business together


Local Enterprise Office

BORD OIDEACHAIS AGUS OILIÚNA CHILL DARA AGUS CHILL MHANTÁIN
KILDARE AND WICKLOW EDUCATION AND TRAINING BOARD

Maynooth University
National University of Ireland Maynooth

Skillnet IRELAND

SETU
Ollscoil Teicneolaíochta an Oirdheiscirt
South East Technological University


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# Executive Summary

Sonya Kavanagh
*Chief Executive,*
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The County Kildare Skills Strategy, has been developed by Kildare County Council in partnership with the County Kildare Chamber. It represents an important step towards continued support for the County's growing economy and sustainable development out to 2030. The document provides a detailed overview and understanding of the employment landscape in the County, identifying skills needs and gaps across six key areas including:


The strategy has been developed in close consultation with key stakeholders including state agencies, the private sector and education and training providers, with a view to ensuring that the County's skills and workforce needs are addressed over the next number of years. The strategy includes a review of existing policy, socio-economic and sectoral analysis, consultation findings, a SCOT analysis and recommendations. A summary of key elements and findings of the strategy is outlined below.

### Socio-Economic & Sectoral Analysis

Detailed socio-economic and sectoral research was conducted as part of the development of the strategy. The socio-economic research provides context and understanding of the current landscape of the County and covers population, employment, education, housing and transport and commuting. The sectoral research examines the six key sectors analysing potential projected growth scenarios and an overview of the associated potential projected demand for skills supply. A short summary of key findings from this part of this include:

- County Kildare is a growing County with the **population increasing 11.4% between** 2016 – 2022 to 247,774, with NPF projections suggesting the County will grow to approximately **281,456 persons by 2030.** The median price of a home in the County rose 87% between 2011- 2023 and is now 7% higher than the national average.

- County Kildare also has a **highly educated population** with 49% of the population holding some form of higher-level education in 2022, **above the state average** of approximately 45%. Residents of the municipal districts of Naas (56%) and Cellbridge-Leixlip (54%) recorded the highest levels of those with higher education qualifications in the County.

- In relation to employment, in 2022 59.1% of persons aged 15 years and over were classed as being 'at work' which is above the national average of 56.1%, while the **unemployment rate in the County (4.6%) was also lower than the State (5.1%).** However, the County also had **the second highest commuting time in the state** at 34 minutes, with County Dublin being the most travelled to area for commuters from the County

- In terms of the key sectoral analysis, the sectors that saw the **highest growth rates in employment between 2011-2022 were tech and ICT (81%), logistics & distribution (21%) and construction, engineering & energy (14%).** Similarly, these sectors are projected to have the largest increases in employees in a high growth scenario, though it is important to note that all projections have a high degree of uncertainty.

- There is limited employment data on the equine sector due to the informal nature of some positions and roles in the sector. However, it is acknowledged that **equine is a key and prominent sector in the County** and important contributor to the wider economy.

- Analysis of the number of higher education graduates required to support the key sectors in County Kildare in a high growth scenario indicates that the potential demand for such graduates would be highest in agriculture & food manufacturing; tourism, hospitality, leisure, and retail; logistics & distribution; and tech & ICT.

- However, skills will also be required from workers who have pursued apprenticeships or other courses outside of higher education institutes. This is particularly reflected in the case of the traditional trades which are in demand across a number of sectors including construction, engineering, and energy; as well as in the case of skilled workers for the equine sector which is also experiencing staff shortages in a number of areas.

## Stakeholder Consultation

As part of the development of the strategy, thorough consultation was conducted between May – July 2024. The consultation engaged with a range of stakeholders from state agencies, the private sector, and education and training providers. It included one-to-one interviews, sectoral themed workshops, a business survey and the ability to provide written submissions. The consultation provided the opportunity to get a detailed understanding of the specific skills gaps, needs and other issues being experienced across the key sectors. It also provided an opportunity to understand the level of provision, initiatives and engagement between the private sector, state agencies and training and education providers. Key overlapping themes are outlined below, with further detail provided in the consultation (Chapter 5);


- Challenges in relation to **staff shortages** and retention issues were evident across many of the sectors. The roles that are proving challenging to fill and the extent of the issues being faced vary by sector. The tourism, hospitality, leisure & retail sector,equine sector and agriculture sector appear to have larger issues with staffing and retention.

- Key constraints highlighted in relation to attracting people to work in Kildare were issues with **accommodation and public transport.** These were brought up by all participants, across all sectors and were cited as major issues affecting the ability of employers to attract and retain staff as well as the shifts staff could work.

- A recurring theme across all sectors was the need for greater engagement and collaboration with **education and training providers.** This included general engagement to understand what courses were available and who to contact as well as greater coordination on curriculum development to ensure that training and education provision was meeting the needs of employers.

- There was general agreement on the need for a greater provision of **apprenticeships** and to raise awareness of current provision to encourage enhanced uptake, particularly in the traditional trades. Tradespeople were notably in high demand across a number of sectors including in the construction and engineering sector, the agriculture and food manufacturing sector, logistics and distribution sector, and the tech & ICT sector.

- The need for supports and skills in the areas of **sustainability** to support this transition was highlighted repeatedly during the consultation. **The requirements for these skills covered many areas of business and operations across all of the sectors.**
- The need for candidates with **adequate managerial and leaderships skills** was prevalent across many of the sectors. Gaps in management and leaderships skills were noted across the engineering, equine, tourism, hospitality, leisure and retail sectors.
- Across multiple sectors, the **shortage of soft skills** was highlighted as an issue, these included communication, teamwork adaptability and resilience.
- The shortage and demand for workers with experience in the area of **supply chains and logistics** was highlighted, particularly in relation to the agriculture and food manufacturing, and the logistics and distribution sectors. It was perceived that there was a limited number of logistics and supply chain courses in Ireland.
- The demand for **digital and data analytics skills** was notable across the tourism, hospitality, leisure & retail sector and the construction sector.
- A common recurring theme was the need for **greater promotion of County Kildare** as a place to live and work, and enhanced awareness raising of the career opportunities that exist. It was felt that this should be done in collaboration and coordination with the private sector and include community outreach to help foster greater understanding of the sectors and careers available.

## Recommendations

The Skills Strategy includes 4 thematic recommendations with 40 supporting actions. The recommendations have been developed from the findings of the socio-economic profile and sector analysis as well as from the views, feedback and ideas put forward during the consultation process. They have been designed to assist in addressing gaps and issues evident in the key sectors, and to support the continued supply of a skilled workforce and the development and future growth of the economy in County Kildare out to 2030. The 4 thematic recommendations are as follows:

**Increasing Collaboration**
on increased collaboration between key stakeholders to ensure alignment and understanding of skills needs and education and training provision in the County.
*8 Actions*


**Skills Development and Sectoral Supports** – provision of information and supports to ensure the needs of key sectors in the County are being met.
*18 Actions*

**Skills Development and Sectoral Supports** – focused on the provision of information and supports to ensure the needs of key sectors in the County are being met.
*10 Actions*

**Infrastructure and Services –**
ensuring that there is adequate infrastructure and services to support economic growth including in relation to space for businesses, transport and accommodation.
*4 Actions*

Each of the thematic recommendations has both cross-sectoral and sector specific actions with suggested enabling agencies (partners), timeframes, key performance indicators (KPIs) and sectoral relevance included for each action. Further detail and context for each of the recommendations and the full list of actions are outlined in Chapter 7.

# 1 Introduction

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## Introduction

County Kildare has a growing population, strong educational attainment and a diverse economy, with much success seen in the County over the last number of years. Furthermore, with its attractive towns, strong retail offering and thoroughbred heritage, the County has much to offer as a place to live, visit, work and invest. To support the sustainable development of the County, it will be imperative that talented workforce with the skills needed to support a growing and innovative economy.

Taking this into account and in a proactive step to address current and future needs, Kildare County Council has partnered with County Kildare Chamber to undertake analysis of the existing talent and skills in County Kildare and the skills requirements across the County out to 2030. This document, the Kildare Skills Strategy, is a result of this partnership and subsequent analysis. Through its development the strategy has sought to develop a detailed view of the employment landscape, and identify existing skills gaps as well as skills needs for the future. The strategy and its recommendations seek to ensure that there will be an adequate supply of sufficiently skilled labour available in Kildare over the coming years to support sustainable economic growth and development. As outlined in the sections that follow, central to the success of the strategy will be an ongoing and enhanced approach to the promotion of opportunities, the provision of supports and the collaboration between key stakeholders in state agencies, the private sector and education and training providers to meet the skills needs of the County out to 2030 and beyond.

### 1.1 Development and Focus

The strategy has been developed from socio-economic and sectoral analysis as well as a thorough consultation process. The consultation process conducted between May – July 2024 included a survey, workshops and 1-1 interviews with a range of stakeholders including state agencies, the private sector and education and training providers (including KWETB, Maynooth University, SETU).

The focus of the strategy is on six key economic sectors in County Kildare. The sectors were identified through analysis of available data, policy priorities and discussions with relevant stakeholders. In some instances, sectors with similar skills/needs have been grouped together for the purpose of the analysis. The six key sectors are as follows:


The recommendations, outlined later in document, have been informed and developed from the findings of the socio-economic research and key sector analysis as well as from the feedback and findings from the consultation process. As such, the recommendations are reflective of the views and ideas put forward by the privatesector, education and training providers and the wider community of County Kildare and look to directly address the County's needs.

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## 1.2 Overview of the Strategy

The strategy consists of the following chapters:

- **Chapter 2** which provides an overview of relevant policies and strategies at the international, national, regional and local level which have been taken into consideration in the development of this strategy including in relation to the identification of the key sectors and the recommendations.
- **Chapter 3** which includes a socio-economic profile of County Kildare covering population, employment, education, housing and transport, providing a baseline understanding of the County.
- **Chapters 4** which analyses the six key sectors, examining projected growth in each sector through a number of different scenarios (baseline, high growth and low growth) and providing an overview of the potential projected demand for skills and the associated supply.
- **Chapter 5** which provides a summary of the stakeholder consultation and industry engagement with information on the strands of consultation conducted and the key findings identified from analysis of feedback.
- **Chapter 6** which includes a SWOT analysis outlining the County's main Strengths, Weaknesses, Opportunities and Threats based around the findings from the research, consultation and analysis.
- **Chapter 7** which includes the recommendations consisting of four key themes supported by associated actions covering both cross-sectoral and sector specific initiatives. For each action a suggested timeframe and enabling partners are included.

Taken together the socio-economic research, the consultation findings, sectoral analysis and recommendations provide a solid foundation from which County Kildare can address the County's skills needs and support sustainable economic growth out to 2030.

# 2 Policy Review

This section provides an overview of existing policy and strategy that is influencing County Kildare's development in relation to skills and the economy. This includes strategies and policies at the international, national, regional and local level. Of particular interest in the review is the extent to which these plans or policies refer to any skills shortages and skills gaps that need to be addressed. Furthermore, along with the initial research of available data, the policy review has assisted in identifying the six priority sectors for more detailed analysis.

A summary list of relevant policies and strategies in relation to the skills project is provided below:

| Level | Policy Document |
|---|---|
| **International** | OECD Skills Strategy |
| **National** | Ireland National Skills Strategy 2025 |
| | National Further Education and Training Strategy |
| | Skillnet Transforming Business Through Talent Strategy 2021 – 2025 |
| | Review of the Expert Group on Skills for Zero Carbon |
| **Regional** | Mid-East Regional Enterprise Plan |
| | KWETB Statement of Strategy |
| **Local** | Kildare County Development Plan 2023 – 2029 |
| | Kildare Local Economic and Community Plan 2023 – 2029 |
| | Kildare 2025 Economic Development Strategy |
| | Kildare Hub Strategy 2022 – 2025 |
| | Kildare Food, Beverage and Hospitality Strategy 2021 – 2023 |
| | Local Enterprise Development Plan: LEO Kildare Plan 2021 – 2024 |
| | Maynooth University Strategic Plan 2023 – 2028 |

From the existing policies and strategies, several recurring and common themes and sectors have been identified. These findings have been considered during the development of the skills strategy to ensure that it aligns, complements, and supports local, regional and national goals and priorities. Key findings and themes include the following:

**Priority Sectors for Kildare:** A number of sectors were highlighted throughout a number of the policies, with priority sectors covering areas such as equine, tech & ICT, engineering and construction, distribution & logistics, hospitality and retail, agriculture and food manufacturing, and tourism. These sectors and areas of focus also broadly align with sectors evident in regional and national policies.

**Skill development and alignment:** The need to enhance the provision of skills and training development and increase the inclusive participation of people in lifelong learning was evident throughout a number of the existing plans and policies. Similarly, the need to increase alignment between skills provision and the needs of the public and private sector was seen to be vital. Furthermore, the need for supports for general crosscutting skills in relation to areas like management, teamwork, and multilingual skills was also evident.

**Digital and IT skills:** The need to enhance skills in this area was also evident both in more general terms as well as in relation to current and future opportunities relating to areas such as AI, robotics and big data/data analytics. Furthermore, the need to continue to assist businesses in digitising their operations was also notable across sectors, including SMEs, to assist with competitiveness and efficiency.

**Sustainability:** A number of the policies outlined a demand for skills and opportunities in relation to the green economy. This includes the potential for the development of a green technology sector in Kildare as well as skills relating to the construction and engineering sector such as retrofitting. Furthermore, there was also a notable emphasis on the need for knowledge sharing, training and supports to assist existing businesses and sectors to become more sustainable.

**Hubs Infrastructure:** The hub infrastructure in County Kildare was highlighted in relation to its importance in supporting business growth and entrepreneurship, supporting remote and hybrid working and innovation though hubs and centres related to the food, beverage, agriculture and equine industries,

## 2.1 International Policy

### 2.1.1 OECD Skills Strategy Assessment and Recommendations

The OECD Skills Strategy Assessment and Recommendations report provides an overview of how to improve Ireland's skills outcomes, with a particular focus on Ireland's National Skills Strategy (NSS) 2025. The document identifies specific priority areas for action and tailored recommendations to help realise this.

| Priority | Description |
| --- | --- |
| 1: Securing a balance in skills through a responsive and diversified supply of skills | Given the rapid change in skills needs globally, Ireland must ensure that it develops a system which can identify and respond to changes in skills supply and demand. |
| 2: Fostering greater participation in lifelong learning in and outside of the workplace | A growing need to regularly upskill and reskill Ireland's labour market is heavily dependent on the participation of Ireland's population in lifelong learning. |
| 3: Leveraging skills to drive innovation and strengthen firm performance | Better leveraging skills will be central to supporting economic growth, promoting resilience to global megatrends, and ensuring Ireland can achieve its aims of digital leadership and a just transition. |
| 4: Strengthening skills governance to build a joined-up skills ecosystem | The complexity associated with skills policies, compounded by the uncertain and rapidly changing environment in which skills policy decisions are made, makes strong skills governance essential. |

Additionally, the document provides findings from an analysis of global skills trends which are wide-reaching. In particular, skills which are in high demand include:

- **Teamwork-related** skills (such as working with others, sharing information, communication skills).
- **Various digital skill**s (such as analysing digital datasets, troubleshooting and efficiency in using workflow application software like Microsoft Office).
- **Management skills** (such as supervision of projects and people, delegation, leadership and motivation).

The report also identifies STEM sector (science, technology, engineering and mathematics) related jobs as requiring both increased participation in learning and upskilling in Ireland.

## 2.2 National Policy

### 2.2.1 Ireland's National Skills Strategy 2025

Ireland's National Skills Strategy 2025 forms an integral part of the Government's long term economic plan to restore full employment and build a sustainable economy and aims to build on the progress made under previous iterations of the Strategy. There are six objectives which aim to achieve the vision set out within the Strategy:

1. Education and training providers will place a stronger focus on providing skills development opportunities that are relevant to the needs of learners, society and the economy.

2. Employers will participate actively in the development of skills and make effective use of skills in their organisations to improve productivity and competitiveness.

3. The quality of teaching and learning at all stages of education will be continually enhanced and evaluated.

4. People across Ireland will engage more in lifelong learning.

5. There will be a specific focus on active inclusion to support participation in education and training in the labour market.

6. Increase in the supply of skills to the labour market.

Launched in 2016, the changes in the skills and labour market have been significant since the Strategy's publishing. However, the Strategy outlines trends in skills supply and demand and identifies the following sector-related trends many of which are still relevant:

- Skills shortages are apparent in Professional and Associate Professional roles across sectors such as **ICT, Science and Engineering.**

- A lack of **ICT-related skills** due to the pace of innovation within this area. Particular sectors affected by this include Software, Data Analytics, Financial Services and Distribution.

- Given the priorities of central government to increase housing supply, support retrofitting and renewal energy installations, skills shortages are growing in **the Construction, the Freight Transport, Distribution & Logistics sectors.**

- **Multilingual skills** are seen as a key skills demand within the labour market across all sectors, particularly for Associate Professionals in ICT, Sales & Marketing, and for administrative staff in Financial Services and Freight Transport, Distribution & Logistics sector.

### 2.2.2 The National Further Education and Training (FET) Strategy

The National FET Strategy, produced by SOLAS, is the primary strategy for transforming learning outcomes in Ireland. The approach within the strategy is centred around three strategic pillars:

- **Building Skills:** FET will build skills to anticipate and respond to rapidly evolving regional and national needs. FET can facilitate a pathway that will link to a particular career or profession, either directly or through ongoing study in higher education.

- **Fostering Inclusion:** FET ensures that supports are available to allow any individual, regardless of background or formal education level, an opportunity to learn and develop.

- **Creating Pathways:** FET must be simplified by offering clear pathways into FET, within FET and from FET, encouraging and facilitating ongoing engagement at all stages of people's lives and careers.

Section Three of the Strategy, citing The Expert Group on Future Skill Needs report Digital Transformation: Assessing the Impact of Digitalisation on Ireland's Workforce, notes that 1 in 3 Irish jobs are at a high risk of being affected by the adoption of digital technologies. The primary sectors which are the most at risk by digital transformation include **agriculture, retail, transport, hospitality, manufacturing.**

### 2.2.3 Skillnet Transforming Business through Talent 2021 – 2025

The primary objective of Skillnet Ireland is to advance the competitiveness, productivity and innovation of businesses operating in Ireland through enterprise-led workforce development. The 2021 – 2025 Strategy outlines initiatives needed to help address the challenges facing Irish businesses and workers, and to meet the current and future demands of digital transformation among SMEs. The Strategy's approach is built around three strategic themes:

- **Workforce Design:** analysing the workforce, determining its future needs, and identifying the gap that exists between what the organisation needs now and what it will need in the future.

- **People Development:** as working environments become more complex and greater agility is needed, developing people is an essential need to achieve business goals.

- **Strategic Innovation:** placing businesses ahead of the curve by boosting creativity, ideation and productivity and helping workers adapt to the new world of work by future proofing their skills.

Several Skillnet initiatives are presented under each strategic theme. These initiatives relate to challenges, trends or opportunities within the Irish market:

- **Customer Experience (CX) Sector:** New programmes subsequently developed by Skillnet Ireland are to provide career transition pathways for workers in roles vulnerable to digital transformation in CX, opening up opportunities to the richer, knowledge-based roles which will emerge with the rollout of automation in traditional CX sectors.

- **Data Science:** The establishment of new educational courses and programmes centred on Data Science will be key to placing Ireland as a world leader in the field of Data Science.

- **Digitalisation in Manufacturing:** Skills centred around robotics, data analytics, machine learning, cyber-physical systems, and the digitalisation of production will become integral requirements of new jobs in the Manufacturing sector.

- **Sustainable Finance:** As climate change grows in its threat to the environment and economies, specialist talent demand will continue to grow in the Sustainable Finance sector.

### 2.2.4 Skills for Zero Carbon: The Demand for Renewable Energy, Residential Retrofit and Electric Vehicle Deployment Skills to 2030

The Skills for Zero Carbon: The Demand for Renewable Energy, Residential Retrofit and Electric Vehicle Deployment Skills to 2030 report was produced by the Expert Group on Future Skills Needs (EGFSN). The group advises the Irish Government on the current and future skills needs of the economy and on other labour market issues that impact on Ireland's enterprise and employment growth. It has a central role in ensuring that labour market needs for skilled workers are anticipated and met.

The 2021 report is concerned with the nature of the skills market and its role in achieving net zero carbon emissions. Within the report is a labour market analysis for each main occupational group. This is outlined below:

| Occupation | Labour Market Summary |
|---|---|
| Engineering | There does appear to be a shortage of engineers with the necessary skills and experience to work in the sector. |
| Environment, Planning, Legal and Professional | There does appear to be a shortage of professionals with the necessary skills and experience to work in the sector. |
| Construction | There are likely to be labour shortages among general construction occupations relative to the projected increase in demand. |
| Other Emerging and Niche Renewable Energy Occupations | A number of new occupations will be required in the Renewable Energy Occupations as most current occupations lack direct and obvious routes for new entrants, acting as a barrier to stable supply. |
| Electric Vehicles | The inclusion of EV training within the existing Motor Mechanic apprenticeship would likely ensure stable supply for most of the decade. |
| Craft & Retrofit | There appears to be significant labour and skills shortages among most craft & retrofit occupations relative to current supply indicators. There is also a disparity in the numbers completing apprenticeships, and the low numbers subsequently undertaking further training to work in the retrofit sector (e.g., heat pump installation training for plumbers). |

## 2.3 Regional Policy

### 2.3.1 Mid-East Regional Enterprise Plan to 2024

The Mid-East Regional Enterprise Plan to 2024 was launched by the Department of Enterprise, Trade and Employment in 2022. The plan includes projects and initiatives across Kildare, Meath, and Wicklow. It focuses on developing projects in sectors that will make the greatest immediate impact to the region. The plan has five key strategic objectives:

- **Strategic Objective 1:** Position the Mid-East as the primary location for the development of the agri-food hubs.
- **Strategic Objective 2:** Develop the Mid-East as a hub for the screen content creation sector.
- **Strategic Objective 3:** Enable the development and expansion of equine businesses across the Mid-East.
- **Strategic Objective 4:** Ensure that the Mid-East Region accelerates the transition to a low carbon economy.
- **Strategic Objective 5:** Support the continued development of a positive enterprise ecosystem in the Mid-East.

These strategic objectives are supported by 17 actions. These actions refer to specific developments within sectors in the Region as well as in Kildare itself. A brief overview of some of the sector related initiatives are detailed below:

- **Agri-Food Sector:** The Plan aims to further develop the Region's already successful agri-food sector through the construction of three interconnected food hubs across the Region. One of these food hubs is to be located in Athy.
- **Content Creation:** Ardmore Studios and Ashford Studio are internationally recognised within film, TV and animation. These will play a pivotal role in film production in the region into the future.
- **Equine Business:** Irish racing and breeding provides over 9,500 jobs in the core industry and a further 5,700 jobs in directly related roles. Kildare County Council and its partners are developing a National Equine Innovation Centre and putting in place supports for the industry across the region.
- **Renewable Energies:** The transition to a low-carbon economy will inevitably lead to the creation of new enterprises and jobs. The development of a green investment and enterprise zone in Allenwood, County Kildare will create a considerable number of opportunities that are aligned with the skills of those impacted by imminent closures by ESB and the direct impact on Bord na Móna's workers.

### 2.3.2 KWETB Statement of Strategy 2020 – 2024

The Kildare and Wicklow Education and Training Board's (KWETB) Statement of Strategy 2020 – 2024 outlines the plans and vision for the effective delivery of education and training within Kildare and Wicklow over the Strategy period. There are four pillars of strategic priority which provide structure to the vision of the Strategy:

- **Strategic Priority 1 – Teaching and Learning:** Ensuring the highest standards of teaching and learning in all our services, delivering on required standards through an inclusive, innovative and learner centred approach.
- **Strategic Priority 2 – Working and Learning Environments:** To improve both the work and learning environments in all KWETB schools, centres and offices in line with best standards. •
- **Strategic Priority 3** – **Value and Develop our Staff:** Enable staff to pursue excellence through good organisational process and procedures, effective systems of communication, high quality services for staff, development of professional networks, skills training, staff development programmes and an active promotion of positive workplace environments.
- **Strategic Priority 4 – Corporate Governance and External Relations:** To have a robust corporate governance culture and systems, which are accountable and transparent. To support this through effective administrative structures and systems, strong corporate identity (branding /PR), positive customer and stakeholder engagement and compliance.

Throughout the Strategy, a total of 64 actions are included as part of the four pillars of strategic priority. While the Strategy does not state outright the impact ICT will have on the learning/education objectives and outcomes, several actions outline the importance of implementing ICT training within KWETB schools and further education and training centres:

- **Action 2.2.1:** Develop an ICT Strategy for Schools, Further Education and Training and OSD Work Environments.
- **Action 2.3.1:** In consultation with our internal stakeholders identify, prioritise, plan, budget and procure furniture, materials, IT and equipment for our schools and further education and training centres.

Recruitment within KWETB is also identified as an area of specific importance within the Strategy. This includes recruitment strategies for specific roles in which the KWETB is experiencing a shortage:

- **Action 3.1.2:** Develop strategies for sourcing and recruiting staff (Management, Teachers/Trainers and Administrative staff) in an increasingly competitive job market.

## 2.4 Local Policy

### 2.4.1 Kildare County Development Plan 2023 – 2029

The Kildare County Development Plan 2023 – 2029 (CDP) is the primary planning policy document for County Kildare. It sets out the plan for sustainable spatial, social and economic development within Kildare out to the end of the decade. The preparation of the Plan takes into account recent development trends and national, regional, and local policy documents, in particular, the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy for the Eastern Midland Region (RSES).

At a County level, the CDP recognises the impact the Just Transition aims of central and European governments has had on employment within Kildare, with a considerable negative impact on peat-related enterprises and jobs in West Kildare. The CDP commits to creating new job and business opportunities for communities affected by the Just Transition through the development of a new Plan:

- **RE O16:** Support the implementation of the 'Local Just Transition Plan for West Kildare, 2022' a focus of which, through identified thematic actions, is to help communities benefit from new business, income and job creation opportunities in existing and emerging industries.

Several sectors are earmarked for positioning specific towns in Kildare as attractive places to live, work and invest:

- **RE O21:** Develop the Key Town of Maynooth as an attractor for Life Sciences,High Tech, Bio Tech, ICT, Research & Development employment.

- **RE O26:** Continue to support and develop the Self-Sustaining Growth Towns of Newbridge and Leixlip as an attractor but not limited to Biotechnology, ICT, professional services, High-tech manufacturing and research employment.

- **RE O27:** Promote the town of Athy as a Food, Drink and Skills Innovation Hub and to support the regeneration and development of Athy to ensure that it provides an enhanced role in delivering economic growth and promoting sectoral interests, including the development of tourism within the south of the County while recognising the historic importance of the food and drink industry in the town and potential for future development.

- **RE O28:** Continue to support and develop Kildare Town as a bloodstock, tourism and manufacturing location.

A range of sectors/industries are also present across the towns and villages of Kildare. Food and Drink, Tourism and tech are important sectors of growth for these towns as outlined within the CDP:

- **RE O31**: Encourage job creation in the Self-Sustaining Towns of Celbridge, Monasterevin, Clane and Kilcock and with particular focus on the economic areas of biotechnology, digital enterprise, tourism, distilling and brewing industries and food and beverage products...

- **RE O32:** Encourage and promote small scale industry, diversification of the rural economy, new economic opportunities arising from digital connectivity and indigenous innvation an enterprise as well as more traditional natural and resource assets (e.g., food, energy, tourism) in these Towns.

### 2.4.2 Kildare Local Economic and Community Plan 2024 – 2029

The Kildare Local Economic and Community Plan 2024 – 2029 (LECP) sets out the objectives and actions to help promote Kildare's economic and community development for a six-year period. It includes High Level Goals supported by Sustainable Objectives and Actions broadly covering health and inclusion; quality of life, community and civic engagement; climate action and sustainability, and the economy and investment. Regarding skills and jobs, the economic development objectives of Goal 2 focus on building skills across all age groups in Kildare and specific efforts to grow certain sectors within the local economy:

- **2.9** To promote Kildare as the Thoroughbred County through the discovery, sharing and application of new knowledge that will enhance the health, performance and management of horses.

- **2.10** To encourage and support upskilling, job mobility and enterprise creation management.

Particular emphasis is also placed on the role of small and micro-enterprises in Kildare. Objectives within the LECP aim to increase the competitiveness and productivity of the County's micro-enterprises. Similar to other strategic policy documents, the clustering of businesses of either similar scale or similar industry will act as a key enabler of improving Kildare's economic competitiveness and productivity. In addition to this, consultation undertaken as part of the LECP process identified several sectors that require targeted objetives and actions. These sectors include the green and circular bioeconomy, agri-food and beverage, agriculture and the equine industry.

### 2.4.3 Kildare 2025 – Economic Development Strategy

Kildare 2025 is the economic development strategy for Kildare. It sets out a five-year vision that aims to facilitate growth and economic activity for communities across the County. Within the Strategy eight key areas of focus are identified as critical to the future economic success of Kildare. Several of these focus areas are specific economic sectors present within the County:


Four of these focus areas set out strategic objectives relevant to jobs and skills in Kildare:

- **Equine Industry:** Develop Kildare as a world-class destination for equine business.

- **Agri-food Sector:** Become a best-in-class industry, academic and training location for food and drinks by creating a more collaborative and connected sector will help realise the County's potential as a food destination.

- **Sustainable Tourism, Hospitality and Leisure:** The development of greenways and blueways, realise the County's food tourism potential and continued support for Kildare's equine industry.

- **Retail:** Support retail within the County to stay competitive through opportunities for new emerging retailers to become established in the County, such as vintage retailers, web developers for online businesses and local food producers.

### 2.4.4 Kildare Hub Strategy 2022 – 2025

The Kildare Hub Strategy 2022 – 2025 sets out the roadmap for the development of Kildare's hubs infrastructure out to 2025. As stated within the Strategy, the development of this document and the K-Hub Network will provide key learnings and insights as well as a policy test bed that has the potential to provide significant benefits in both rural and urban locations in Kildare and across the Mid-East Region.

The Strategy contains six strategic objectives:

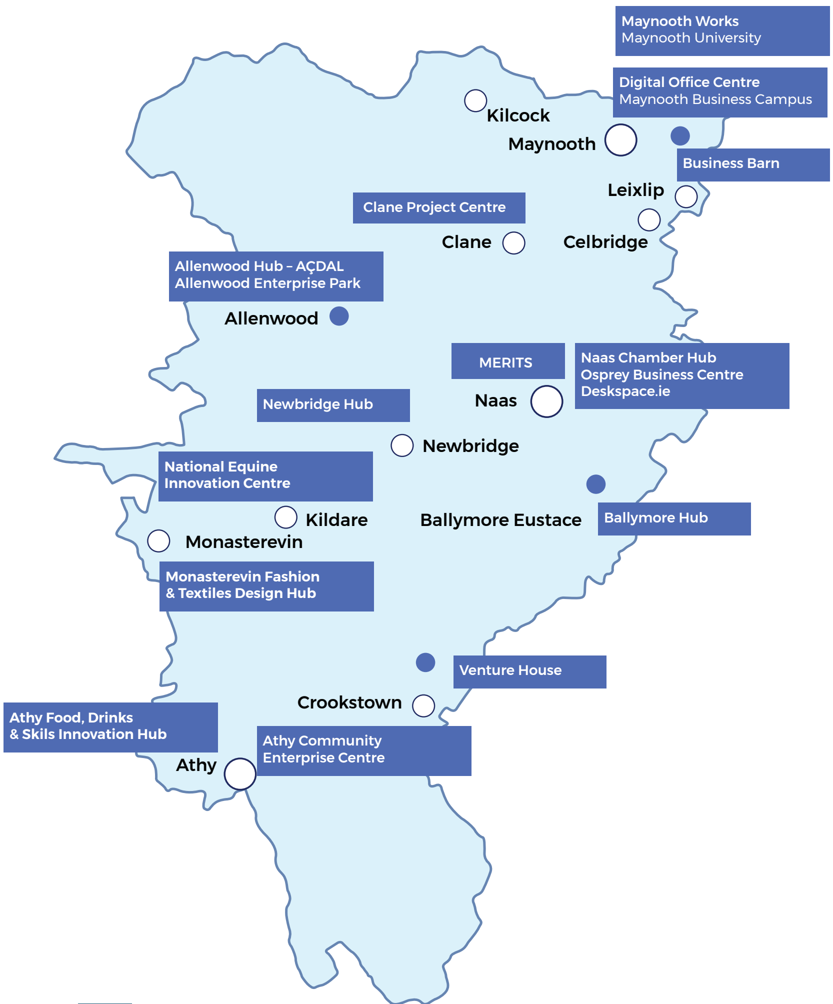
- **Drive Entrepreneurship** in our key / priority sectors through the continued nurturing and collaborative environment for start-ups, investors and service providers
- Ensure local and regional workforce see Kildare as a **responsive and dynamic location for remote working and meeting.**
- Ensure that all existing and future hub infrastructure can achieve a high standard in energy conservation, decarbonisation and promote sustainable and green practice.
- Build on the strengths of the K-Hub Network and promote best practice and shared resources for **management, marketing, events and service innovation.**
- Use the scaling assets and expertise of the network to drive the **growth of hub clients** including export growth.
- Create **a robust methodology and system** for assessing need for intervention and investment by the public sector in future hub provision through a location assessment model.

The Strategy outlines the importance of Kildare's hubs ecosystem for a number of priority sectors, including the knowledge/tech economy, advanced manufacturing, agri-food, the equine sector and the green economy. With remote working and blended working models persisting as a long-term working arrangement for many, several sectors will have a greater propensity to avail of the County's developing network of hubs. These include sectors and roles which are heavily dependent on digital technologies, such as IT, Data and software development.

### Audit of Hub Provision in Kildare Kildare

County has a strong spread of hub facilities by type and location especially when the recently established sector hubs are considered. Theses hubs have emerged over time through a wide and diverses set of partners, share holders and users. Ownership structures vary from community organisations to local authorities, HEI's statutory agencies and also private ownership and partnership models. The hubs can be found in both urban and rural settings and often reflet the sectoral make up of industry in the subject location.

### Kildare Enterprise Hubs




### 2.4.5 Kildare Food, Beverage and Hospitality Strategy 2021 – 2023

As stated within the Strategy, the focus of the Kildare Food, Beverage and Hospitality Strategy 2021 - 2023 is a smart and green recovery based on digitisation, climate action and capitalising on new opportunities. The Strategy aims to play to local strengths in the County while aligning with EU, national, and regional best practices and policies.

A total of 40 actions are listed within the Strategy to support the ongoing development of the food, beverage and hospitality sectors. These actions are set against a suit of strategic objectives. Below are several strategic objectives which are directly or indirectly related to the development of skills or the creation of new job opportunities specific to the food, beverage and hospitality sectors:

- **Bioeconomy:** Broaden Kildare's economic base by growing employment share taken up FoodTech, AgTech and the broader bioeconomy orientated activities.

- **Innovation:** Secure funding investment for the capital development of the Athy Food, Beverage & Skills Innovation Hub to be fully operational by end 2022.

- **Digitalisation:** Assist 30 food and beverage SMEs and hospitality businesses to digitise their business models and increase online sales.

- **Skills Audit:** Conduct an analysis of food employment and skills gaps in Kildare and prepare a needs responsive training plan.

- **Training and Education:** Develop the Discovery Centre at the Athy Food, Beverage & Skills Innovation Hub an outreach education programme in healthy eating, career pathways (emphasis on non-formal routes) and sustainable living.

- **Employability:** Instigate tailored programmes for youth and long term unemployed. Build the local culinary and hospitality talent pool with 450 learners progressing their skills within 3 years.

Furthermore, several trends outlined within the Strategy will also impact on skills and jobs within the food, beverage and hospitality sectors in Kildare over the coming decade:

- **Farming Production:** Demand for food security, sustainable food production, R&D and a global transition to best practice in sustainable farming has the potential to both create new job opportunities and threaten traditional employment within Kildare's farming sector.

- **Growing Talent:** Enable Kildare's youth and working population to develop the skills necessary to thrive within the food, beverage and hospitality sectors will be an essential part of the continued growth and sustainability of these sectors within the County.

### 2.4.6 LEO Kildare Plan 2021 – 2024

Building on the good progress achieved as part of the 2017 strategy, the Local Enterprise Office (LEO) Kildare Plan 2021 – 2024, outlines clear priorities, objectives and actions for the 4-year period. The overall plan is based around three key themes to:

- Build resilience across enterprise and sectors.
- Ensure an inclusive and balanced recovery post-COVID-19
- Future-proof Kildare's economy and society.

Within the Plan there are 6 strategic priorities with associated supporting actions focusing on Entrepreneurship, Competitiveness & Digitalisation, Green & Sustainability, Innovation, Exporting/Internationalisation, and Networks & Clustering. The plan also outlines a number of areas to strengthen the entrepreneurial ecosystem in Kildare including in relation to Mentors, Advisors & Support Systems; Universities as Catalysts; Education & Training, and Human Capital & Workforce.

Furthermore, the plan outlines a number of key sectors and opportunities for development over the plan period. This includes:

- **Knowledge Economy:** Opportunities to enhance growth in knowledge-intensive services in County with a potential for the creation of further high-paid jobs and self-employment.
- **Equine:** Opportunities to grow the equine sector in the County including through the development of Ireland's first Equine Technology Accelerator and Equine Innovation Hub
- **Agri- Food and AgTech:** Further support the food and Ag/Tech sector through the Athy Food, Beverage & Skills Innovation Hub and the AgTech Connector Innovation Hub at the UCD Lyons Farm in Kildare.
- **Tourism:** Support the recovery of the tourism and hospitality sector building upon the County's growing reputation as a hospitality and food destination.
- **Climate and Sustainability:** Acknowledging the impact of the end of peat harvesting on jobs seek to support the development of the green technologies sector in the County.

### 2.4.7 Maynooth University Strategic Plan 2023 – 2028

The Maynooth University Strategic Plan 2023 – 2028 centres on advancing student learning, excelling in research and creating societal impact, expanding internationalisation, and fostering strong engagement within the University and with its partners. The Plan is structured around five research areas:

- **Data and Digital Transformation**
- **Health and Wellbeing**
- **Heritage, Culture and Language**
- **Society and Public Policy**
- **Sustainability and Climate Change**

A set of 10 Goals are also outlined within the Plan. A number of these goals are of particular importance to the skills and jobs markets within Kildare and the region as a whole including:

- **Digital Transformation:** MU announced the opening of its Robotics Lab in January 2024. Supported by Intel, the Robotics Lab will increase access to innovative robotic technologies and equipment used by engineers from Intel and other companies.
- **Sustainability:** The development of the MU campus as a 'Green Living Lab' for sustainable research, teaching, working and living. It is envisaged create opportunities for the expansion of programmes relating to sustainability and leadership, climate change and governance.
- **Health and Medicine:** The establishment a new School of Health and Medicine in order to support new models of health workforce development.
- **Industry Partnerships:** Pursuing enhanced partnerships with industry employers and institutions to increase the employability of its current and future student population.


MERITS
INNOVATION THINKSPACE

# 3 Socio-Economic Profile

This chapter provides a socio-economic overview of County Kildare. Census 2022 data has been utilised to analyse the socio-economic characteristics of the County including overall population change, the components of population change (births, deaths, migration), age profiles, population projections to 2030, education figures, business demography and labour market statistics.

The analysis has been conducted at the electoral district (EDs) and municipal district (MDs) level, with the five MDs of County Kildare being Athy, Celbridge-Leixlip, Clane-Maynooth, Naas, and Kildare-Newbridge. Athy MD is the largest in the County by area followed by Maynooth MD. Newbridge and Naas MDs are roughly equal in size with Leixlip MD being the smallest in area of the five MDs. This analysis is essential to understanding the socio-economic landscape of the County and how it could potentially influence the labour force and availability of skills into the future. As such, the analysis is an important element in the development of a Skills Strategy that is reflective of the County's needs.

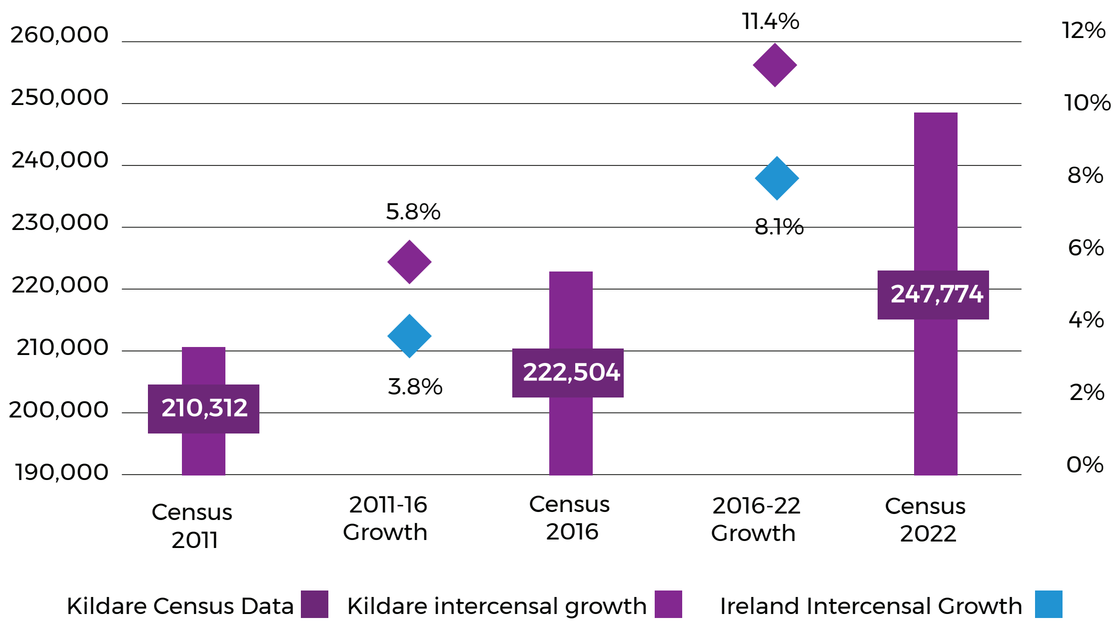
## 3.1 Population

Similar to the state average, County Kildare is characterised by a growing population (i.e., net natural change, positive net migration) with gradually decreasing birth rates and increasing death rates. As the average age increases, so does the share of retired and age-dependent persons. The County's population is heavily concentrated in and around the towns of Naas, Newbridge, Maynooth, Leixlip, Kildare, and Athy.

As illustrated in Figure 3.1 County Kildare's population grew from 210,312 in 2011 to 222,504 in 2016, representing 5.8% growth. The population grew further to 247,774 in 2022, equating to a 2016-2022 growth rate of 11.4%. In both intercensal periods, County Kildare boasted the third highest growth rate in the country, significantly exceeding the national average growth rate, and from 2016 to 2022, also exceeding the Dublin growth rate. In total, over the 11-year period from 2011 to 2022, County Kildare had the third highest absolute growth (after Dublin and County Cork) and the third highest growth rate (after Dublin and County Meath) in the country, confirming its continued attractiveness as a location outside of Dublin.

The population is projected to increase to approximately 281,456 persons in 2030 (in line with NPF Implementation Roadmap projections), implying an annual migration surplus of approximately 3,000.

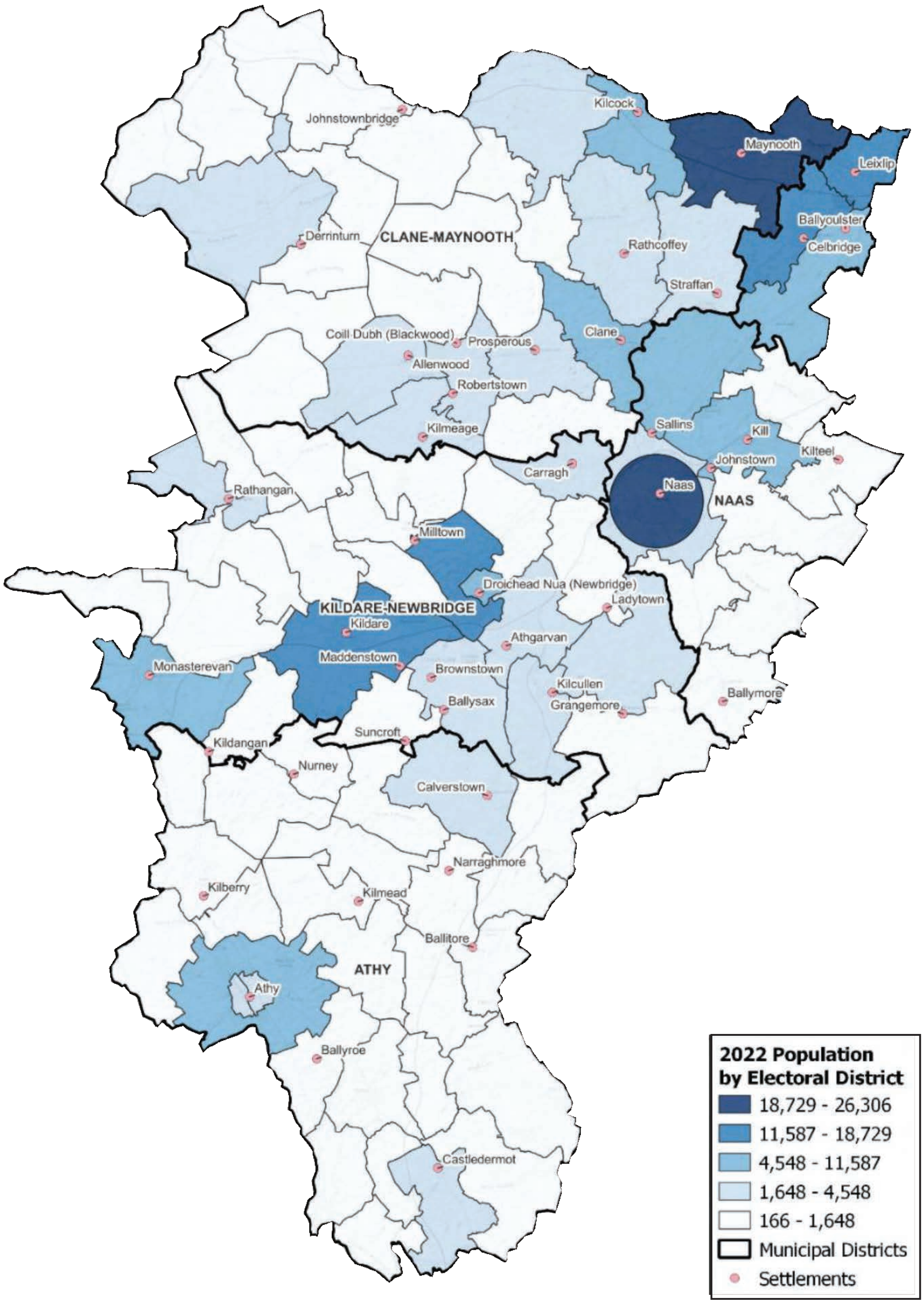
### Figure 3.1: County Kildare Population, 2011-2022



### 3.1.1 Current Population and Regional Distribution

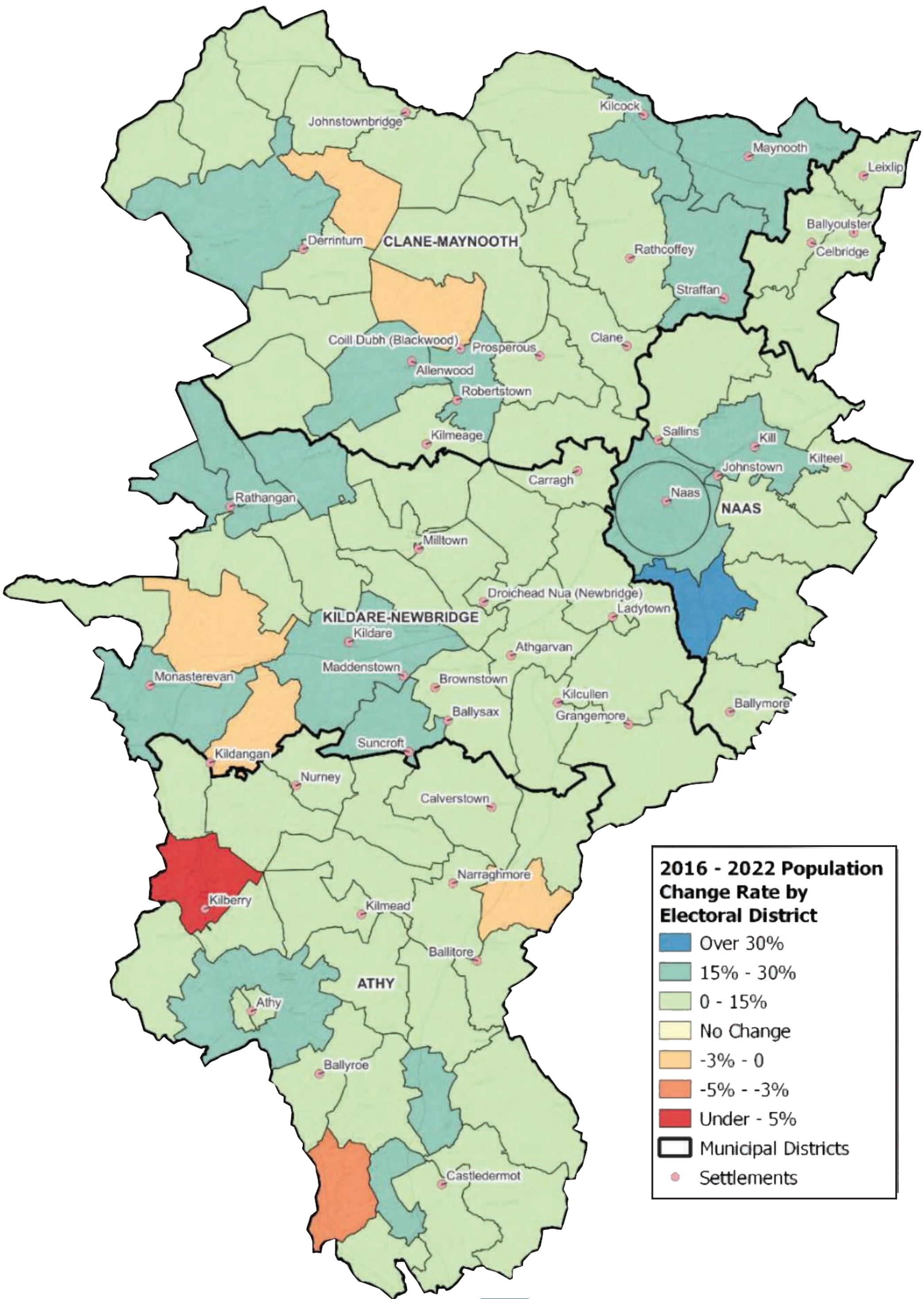
As illustrated in Figure 3.2, the population distribution varies across the County. Significant portions of the population live in the north-eastern corner of the County and the greater Naas town area. Clane-Maynooth MD and Naas MD alone contain 43% of the County's population. The population density is highest in the Celbridge-Leixlip MD (740 persons per sq. km) and lowest in the Clane-Maynooth (122 persons per sq. km) and Athy (62 persons per sq. km) MDs. While the majority of the population is concentrated in the northern corner of the County, and only a portion physically borders County Dublin, the whole of County Kildare is considered to fall within the Greater Dublin Area.

**Figure 3.2: County Kildare Population, 2022**

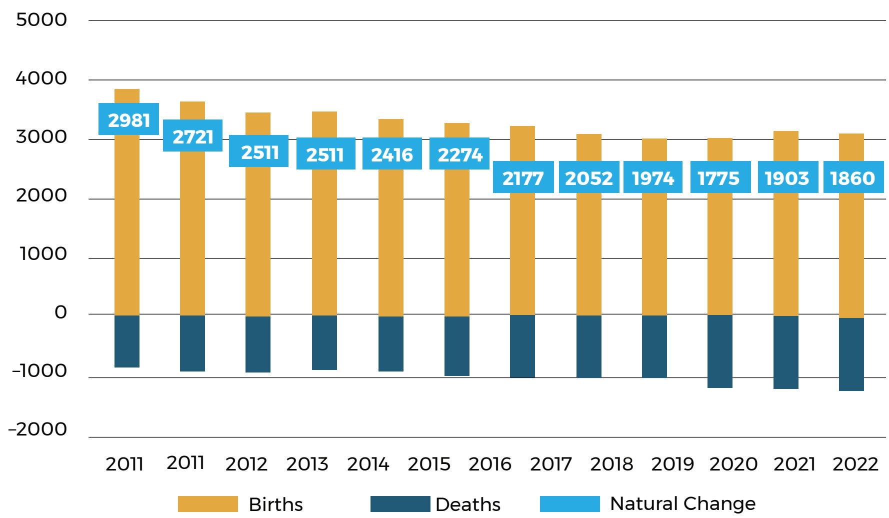


The majority (71%) of EDs in the County have seen population change of 0-15%, with several more EDs (20%) experiencing growth between 15%-30% and one ED in the Naas MD growing by over 30% between 2016 and 2022. Seven EDs recorded a decrease in population, with one of those, located in the Athy MD, recording a decrease of more than 5% of its population (Figure 3.3).

### Figure 3.3: Population Change by ED, County Kildare, 2016-2022



## Table 3.1: Natural Population Change in County Kildare, 2011-2022




Figures 3.4 and 3.5 demonstrate the change in age cohorts over time for County Kildare. Both figures illustrate an increase in the average age of residents in the County, which has risen from 33 years of age in 2011 to 36.3 in 2022 yet average age remains below the national figure. This observation can be primarily attributed to the demographic transition with decreasing birth rates and an increasing life expectancy. Additionally, decreases in the 25-34 age cohorts could be evidence of these groups leaving the County in seek of differing opportunities or experiences elsewhere.

## Figure 3.4: Population Pyramid of County Kildare, 2022 vs 2011

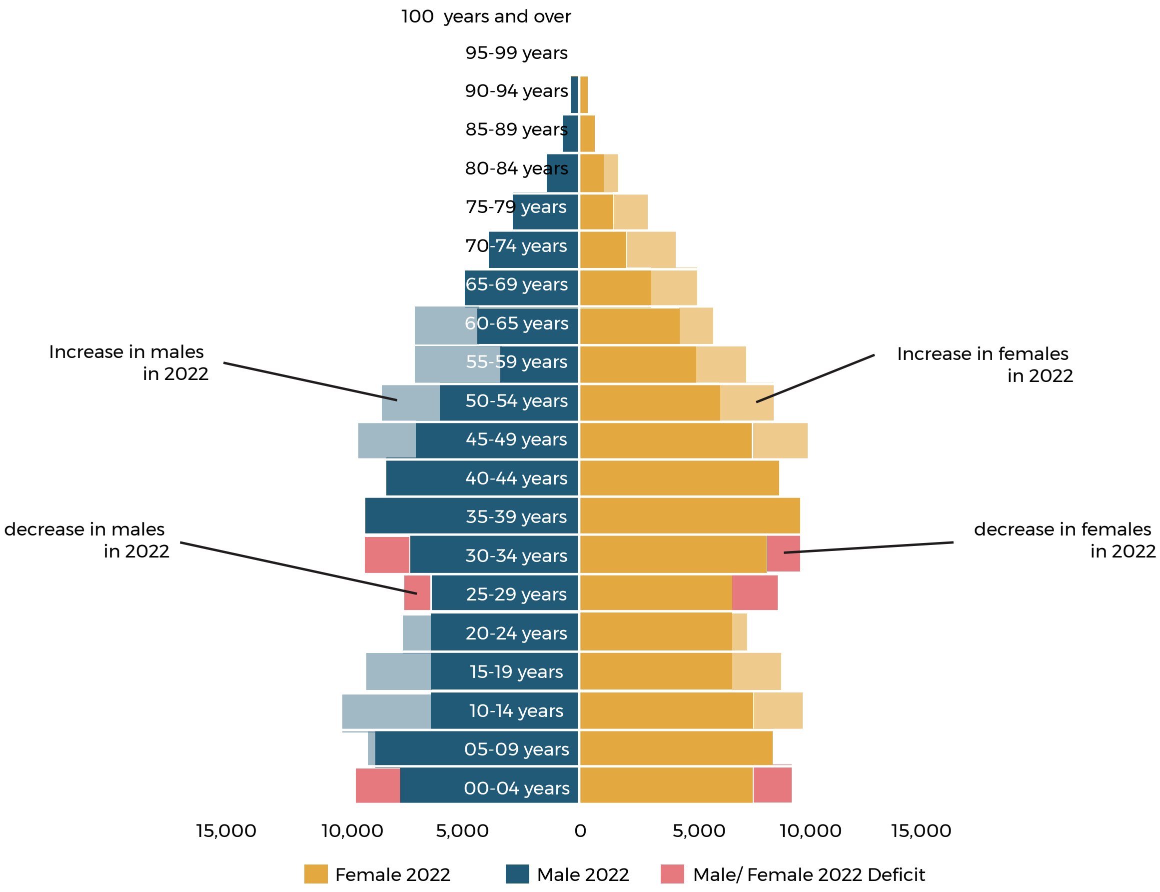
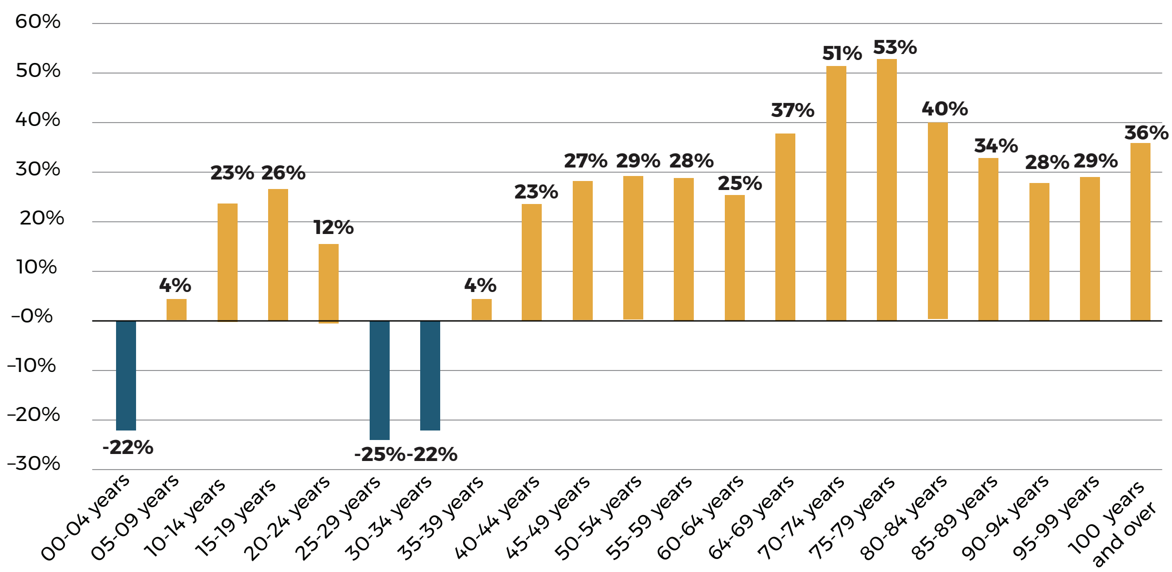


Figure 3.5: Age groups in County Kildare, 2022 v 2011




## 3.1.2 Regional Population Change

Table 3.2: Population of Municipal Districts in County Kildare, 2022

| MD | Area (km2) 2022 | Population 2022 | Population change 2011-2022 | Population density (pers./km2) | Towns of > 2,000 inhabitants |
|---|---|---|---|---|---|
| **Athy** | 464 | 28,641 | +11.7% | 62 | Athy |
| **Celbridge-Leixlip** | 53 | 39,473 | +7.8% | 740 | Celbridge, Leixlip |
| **Clane-Maynooth** | 542 | 66,412 | +25.2% | 122 | Maynooth, Kilcock, Clane, Prosperous |
| **Kildare-Newbridge** | 446 | 67,237 | +16.4% | 151 | Newbridge, Kildare, Rathangan |
| **Naas** | 188 | 46,011 | +23.5% | 244 | Naas, Sallins, Kill, Kilcullen |
| **County Kildare** | 1,693 | 247,774 | +17.8% | 146 | 14 |

### 3.1.3 Population Projections 2030

The 2023-2029 County Development Plan cites two projected population figures for County Kildare for 2031, using the 2016 Census figures as a base. The figures are derived from the National Planning Framework (NPF) Implementation Roadmap, where an estimated population to 2031 is presented with high and low range values. If a linear projection from 2016 to 2031 is assumed, as shown in Figure 3.3, the projected population growth until 2022 remains under the actual population for 2022 (i.e., the Census 2022 population was higher than envisaged by the NPF).

On the 2022 census date, the arrival of refugees from Ukraine had only started, and the majority of the approximately 1,500 - 2,000 refugees that are estimated to be in County Kildare as of February 2024 had not been included. While refugee migration patterns, including potential return, are difficult to predict, the below projections do not include any specific considerations for an increased refugee population.

Using 2022 Census results and applying fertility and mortality calculations, based on assumptions used in the NPF Implementation Roadmap and adjusted for recent trends, two scenarios are proposed for the County's population trend leading to 2030.

- **Scenario 1 (Zero migration)** projects the County's population forward without taking any further migration trends into consideration (i.e., only natural changes – births and deaths – are considered).

- **Scenario 2 (Baseline)** projects the County's population forward on the basis of natural change (births and deaths) and age group-specific net migration change. This scenario assumes that the 2016-2022 growth rate will be maintained through to 2030, this assumption is used because the 2016-2022 actual population change was significantly above NPF Implementation Roadmap projection. A similarly high population growth until 2030 would put the total population further above the NPF Implementation Roadmap projection. In this scenario, approximately 70% of the population growth will be due to (positive) net migration change (i.e., more births than deaths). With regard to a breakdown of migration trends by age groups, Scenario 2 assumes a net migration surplus for the age groups largely representing families (0-14 and 25-59 years), a net migration balance (zero) for the age groups 60 years and older, and a net migration deficit for the age groups largely representing late and post-secondary education (15-24 years).

Figure 3.6 presents the projected population increase according to each scenario. In Scenario 1, the County's population is projected to grow from the 2022 Census figure to approximately 257,191 persons (+3.8%). Scenario 2 projection shows an increase to approximately 281,456 persons (+13.6%).

**Figure 3.6: Population Projection for County Kildare 2023-2030**

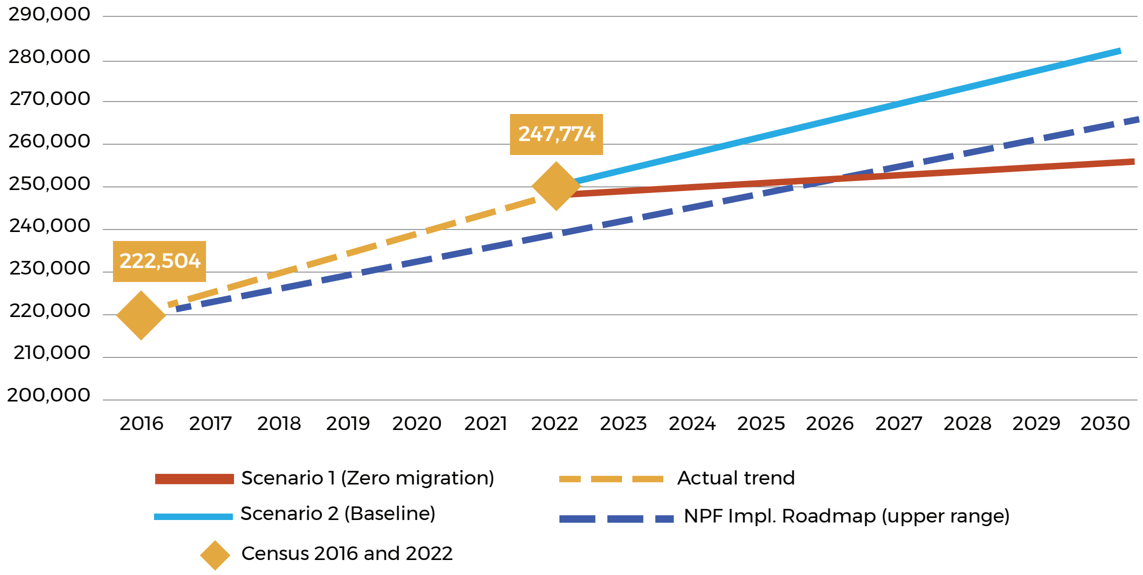



**Table 3.3: Population Projection – Comparison of Scenarios**

| | Scenario 1 ( zero migration) | Scenario 2 (Baseline) |
|---|---|---|
| **Population 2022 (Census)** | 247,774 | |
| **Production 2030 (Projected)** | 257,191 | 281,456 |
| **Accumulated Growth 2023- 2030 (Projected)** | + 9,417 | + 33,382 |
| **Accumulated Growth 2023- 2030 in % ( Projected)** | +3.8% | + 13.6% |
| **Per Annum growth 2023-2030 ( Projected)** | +1,177 | + 4,210 |

Scenario 2 is used as a 'Baseline' trend that continues the 2016-2022 population trend and is above the (linearly) projected population growth in the NPF Implementation Roadmap (upper range). The divergence between Scenarios 1 and 2 until 2030 summates to approximately 24,300 persons which is broadly equivalent to the net migration surplus required to sustain the current growth trend. This translates into approximately 3,000 persons net migration surplus annually.

The scale of migration, especially among younger cohorts, has a significant impact on the size, composition and ageing of the future labour force. A migration surplus, as experienced between 2016 and 2022 and as projected in Scenario 2, will lead to continuous growth and a deceleration of the ageing of the labour force in the coming years. In contrast, a zero net migration balance or deficit, as experienced between 2011 and 2016 and as projected in Scenario 1, will lead to a slow-down and cessation of labour force growth and contribute to its accelerated ageing.

## 3.2 Employment

### 3.2.1 Labour Force

From 2011 to 2022, the total number of persons aged 15 years and over increased from 158,744 to 194,397 (+17.2%). Of these, 123,828 persons were in the labour force (63.7%, Labour Force Participation Rate) in 2022. In 2011, the total number of persons aged 15 years and over in the labour force was 104,266, amounting to an increase of 19,602, or 18.8%, in 2022 (Table 3.4).

**Table 3.4: Population Aged 15 Years and Over in the Labour Force**

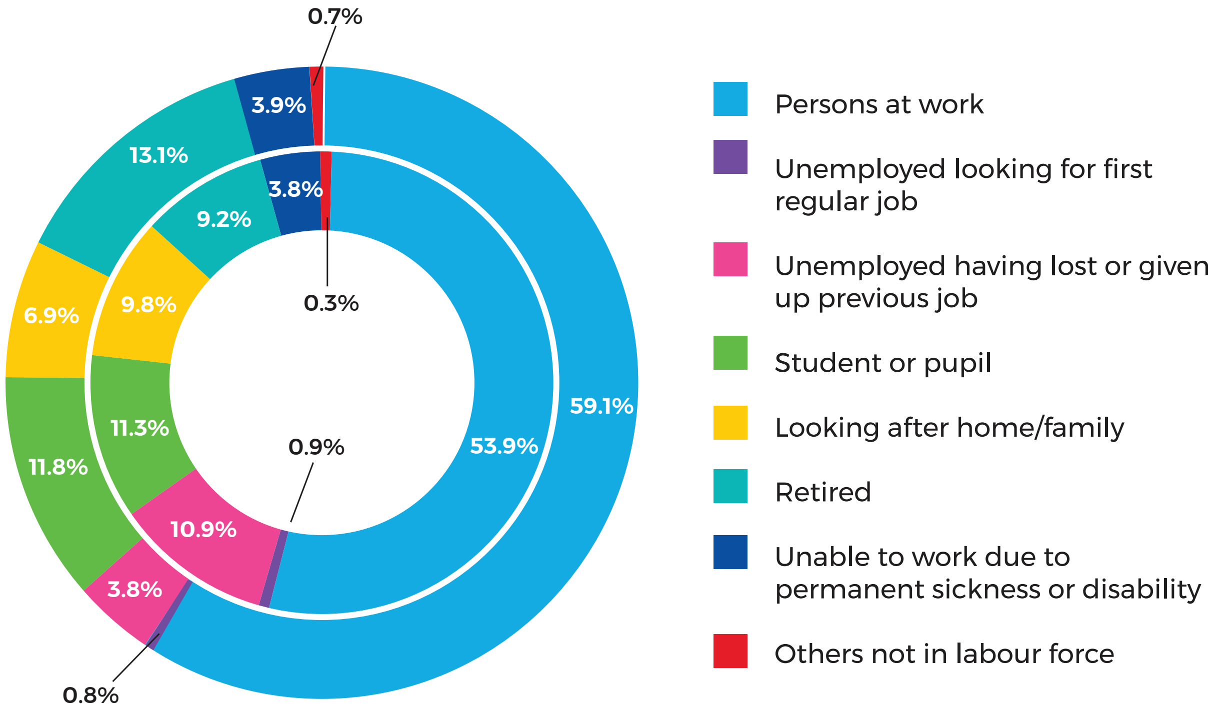
| | Number of Persons | Percentage Kildare | Percentage State |
|---|---|---|---|
| **State Labour Force Participation** | **123,828** | **(63.7%)** | **(61.2%)** |
| ***(Persons at work)*** | ***(114,829)*** | ***(59.1%)*** | ***(56.1%)*** |
| **Employer or own account worker** | 13,910 | 12.1% | 12.2% |
| **Employee** | 100,846 | 87.8% | 79.4% |
| **Assisting relative** | 73 | 0.1% | 0.1% |
| ***(Unemployed)*** | (8,999) | (4.6%) | (5.1%) |
| **Unemployed looking for first regular job** | 1,580 | 1.3% | 1.4% |
| **Unemployed having lost or given up previous job** | 7,419 | 6.0% | 7.0% |
| **Persons Outside the Labour Force** | **70,569** | **(36.3%)** | **(38.8%)** |
| **Student or pupil** | 22,926 | 32.5% | 28.6% |
| **Looking after home/family** | 13,394 | 19.0% | 17.0% |
| **Retired** | 25,384 | 36.0% | 41.0% |
| **Unable to work due to permanent sickness or disability** | 7,597 | 10.8% | 11.8% |
| **Others not in labour force** | 1,268 | 1.8% | 1.7% |
| **Population Aged 15 Years and Over** | 194,397 | 100.0% | 100.0% |

The majority of these persons are classified as 'at work'. This category grew from 95,947 to 114,829 persons (+19.7%) and now accounts for 59.1% of persons aged 15 years and over. This was above the national average of 56.1% of the population aged 15 years and over that were recorded as at work in 2022 (Figure 3.7).

The trend of increasing employment corresponds to a fall in unemployment. During the period 2011-2022 the number of persons categorised as 'Unemployed having lost or given up previous job' fell from 17,268 to 7,419 persons (-57.0%) while the (smaller total) number of persons categorised as 'Unemployed looking for first regular job' increased from 1,371 to 1,580 (+15.2%). With an unemployment rate of 4.6% the potential for further reduction in unemployment may be low.

The total number of persons aged 15 years and over outside the labour force increased from 54,518 to 70,569 persons, an increase of 29.4%. This is mainly due to a significant increase in the number of retired persons from 14,639 to 25,384 (+73.4%). In 2022, retirees accounted for 13.1% of all persons aged 15 years and over. This trend is a result of the ongoing demographic transition that is set to incrementally lead to a higher share of persons in retirement age and fewer people below retirement age (and available for the labour force).

**Figure 3.7: Population Aged 15 Years and Over by Principal Economic Status, 2011 (inner circle) vs 2022 (outer circle)**



### 3.2.2 Enterprises and Employees

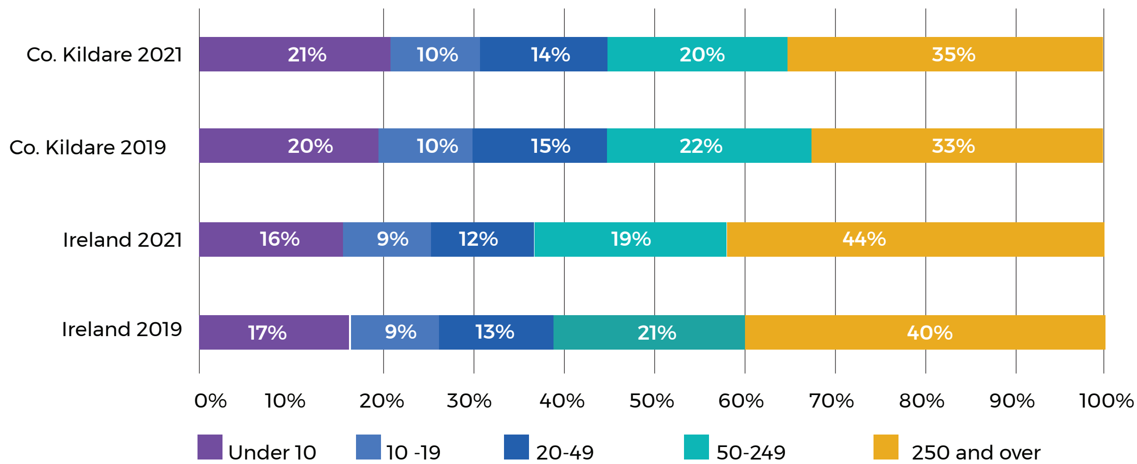
According to the annual Business Demography statistics (Table 3.5), the vast majority of active enterprises (94%) in County Kildare have less than 10 employees (micro enterprises). 6% of enterprises are small and medium-sized enterprises. The number of micro enterprises has significantly grown between 2019 and 2021 (+17%), while the number of enterprises with 10-19 employees has decreased (-4%), the number of enterprises with 20-49 and 50-249 employees have decreased by 7% and 13%, respectively. Also, the number of large enterprises in the County has decreased from 33 to 27 over the period from 2019 to 2021. The trends were comparable to those in Ireland for medium-sized enterprises, while micro enterprises in County Kildare have increased at a faster rate over the two-year-period, and the number of larger companies in County Kildare have decreased at a faster rate.

**Table 3.5: County Kildare Enterprises**

| Enterprise Size | 2019 Co. Kildare | 2021 Co. Kildare | Change Co. Kildare | Change National |
|---|---|---|---|---|
| **Under 10 employees** | 12,228 | 14,325 | +17% | +10% |
| **10- 19 employees** | 560 | 538 | -4% | -1% |
| **20 to 48 employees** | 352 | 329 | -7% | -7% |
| **50 to 249 employees** | 175 | 153 | -13% | -7% |
| **250 employees and over** | 33 | 27 | -18% | -5% |
| **County Kildare** | **13,348** | **15,372** | **-24%** | **+9%** |

As visualised in Figure 3.8, in 2021, nearly one-third (31%) of employees in County Kildare were employed in enterprises of less than 20 employees. Micro enterprises with less than 10 employees accounted for 21% and small enterprises with 10-19 employees accounted for 10% of all enterprises. The percentage of micro enterprises increased 1% since 2019, while the rate of small enterprises was unchanged. Percentages for medium and large-sized enterprises (20 to 249 employees) have decreased by 3% from 37% to 34% over the same period.

**Figure 3.8: Employees and Enterprises**



The distribution of employees contrasts sharply with the overall picture for the state, where in 2021 only 25% were employed in micro and small enterprises (down from 26% in 2019), leaving the remaining 75% employed in medium-sized and large enterprises (up from 74%). The most noticeable difference between the County and the State is in employment in large enterprises (250 employees and over) where the percentage for the State is nearly ten percent higher than that of County Kildare. In conclusion, County Kildare's economy is characterised largely by micro, small and medium-sized enterprises.

### 3.2.3 Key Sector Overview

The skills and occupations examined in the sectoral analysis align with priorities outlined in policies and strategies as referenced in Section 2. Overviews of employment trends between 2011-2022 are provided below in Figure 3.9.

Of the six sectors considered, the total number of occupations as of 2022 was 42,643, which is 34.4% of the total labour force in County Kildare. The largest of which is the tourism, hospitality, leisure and retail sector, with 15,160 employees in 2022, or 36% of all occupations within the six sectors. Employment in this sector has increased 6.4% since 2011. The second largest sector is construction, engineering and energy, with 13,812 employees in 2022, or 32% of all occupations within the six sectors. Since 2011, employment has increased 14.0% in this sector. The next two sectors by number of employees are tech & ICT and logistics & distribution, with 5,084 and 4,174, respectively, accounting for 12% and 10% of the six-sector total. The employment increase in these two sectors since 2011 are 81.3% (the highest among all) and 21.2% (the second highest among all), respectively. The two smallest sectors as of 2022 are agriculture & food manufacturing and equine, with 3,302 and 1,111 employees respectively, accounting for 8% and 3% of the six-sector total. Change in employment of these two sectors since 2011 are -6.4% (the only sector with negative growth) and 3.3%, respectively. Total employment growth across the six sectors since 2011 has increased 14.6%, growing from 37,215 occupations that year to 42,643 in 2022.

**Figure 3.9: Preliminary employment trends in occupations for six focus areas**

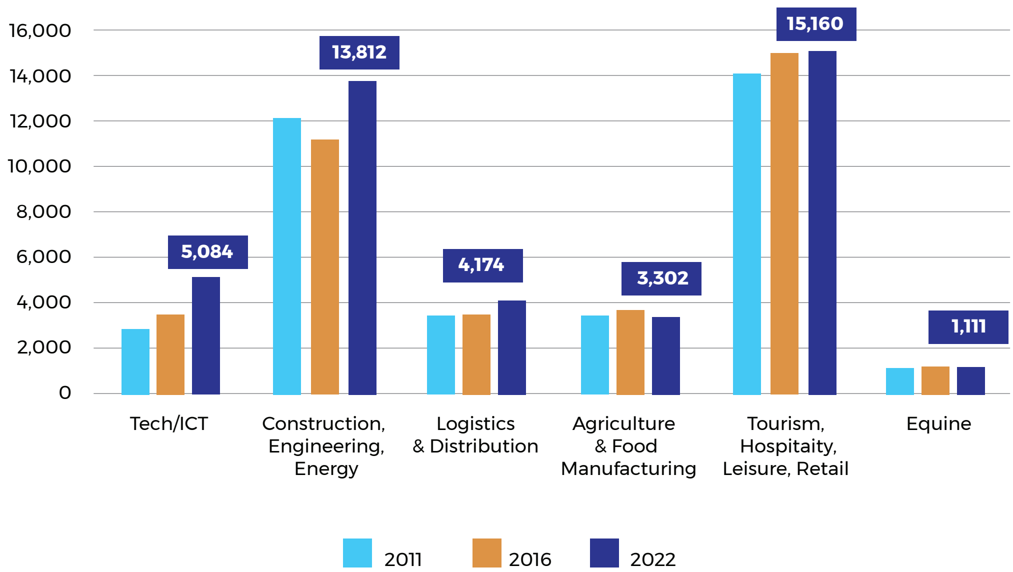
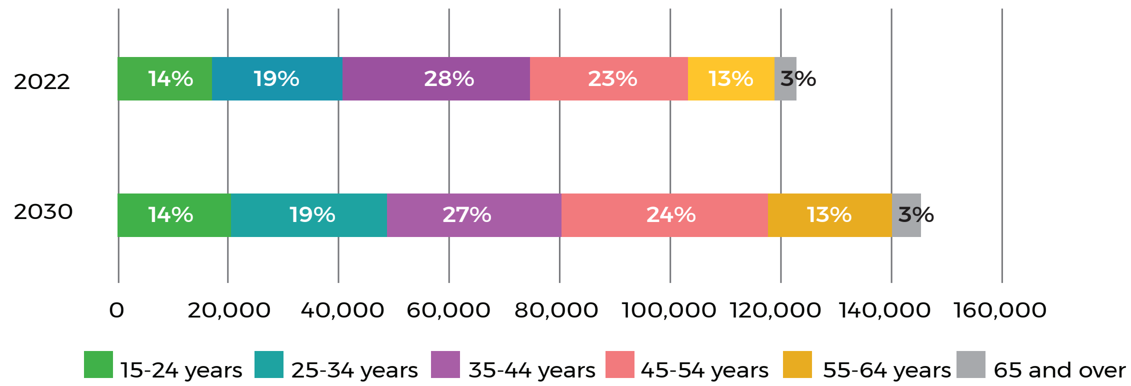


**Figure 3.10: Current and Projected Size and Composition of the Labour Force**




### 3.2.4 Employment Profile Projection 2030

Along with the expected continued growth of the population (Scenario 2) based on migration surplus and natural growth, as well as an expected continued growth of the labour force participation rate, the labour force is projected to grow (approximately 146,800 persons (+18.6%) by 2030 based on 2022 figures. As the population ages, the composition of the labour force changes as well, with decreasing percentages in the 35-44 years age cohort and increasing numbers in the younger and older age cohorts.

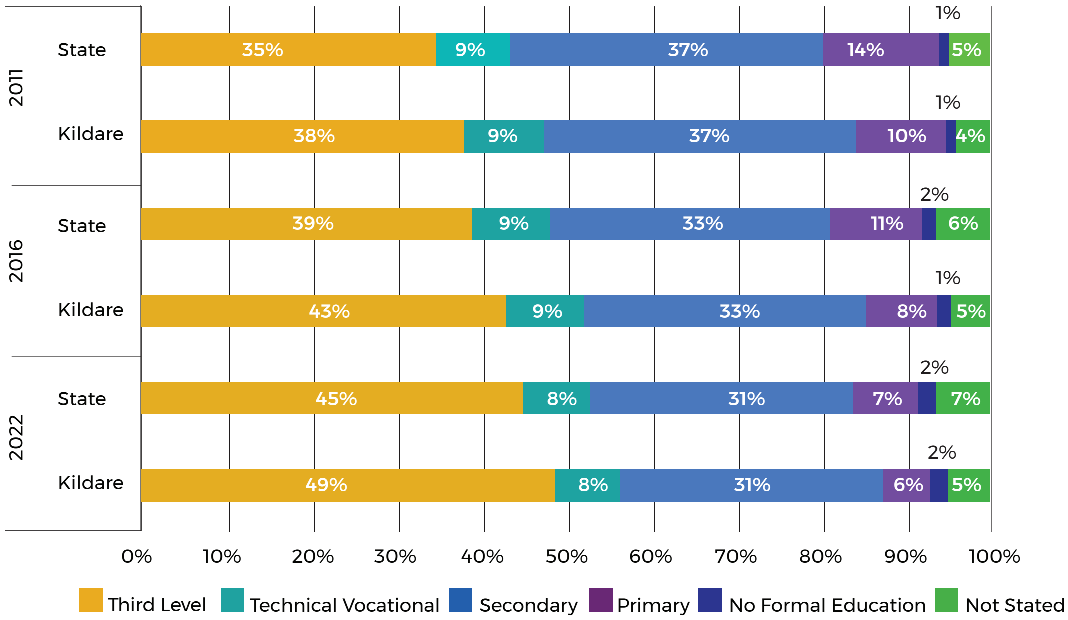
## 3.3 Education

Since 2011, the level of education in County Kildare has improved. Census data from 2011 to 2022 shown in Figure 3.11 indicate that the share of the population aged 15 and older whose highest level of education was primary education, secondary education or technical/vocational education significantly decreased (from 56.8% to 44.5%). Conversely, the share of the population with some form of third-level education (advanced certificate/completed apprenticeship, higher certificate, ordinary bachelor's degree/ professional qualification or both, honours bachelor's degree/professional qualification or both, postgraduate diploma or degree, Doctorate) has increased significantly (from 38.0% to 49.0%). During the same period, however, the share of the population with no formal education altogether has increased (from 1.3% to 2.1%) while the share of the population that did not state their highest level of education has increased (from 4.0% to 4.9%).

Figures for County Kildare and the state largely follow similar education trends (Figure 3.12). In 2022, the largest difference in education level was seen in third level classifications, where County Kildare recorded 4% more students than the state. Primary levels were also lower in County Kildare by 1.5% while the remaining classifications were separated by less than one percentage point.

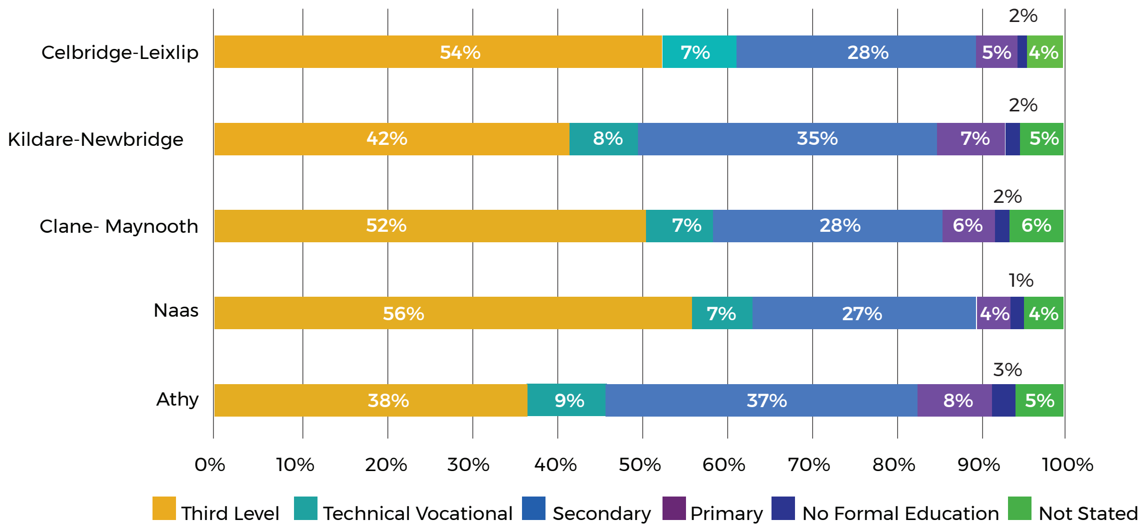
An important distinction pertaining to this statistic is that only the highest level of education achieved is recorded, therefore any lower-level degree that was achieved before completing a third-level degree will not be included.

**Figure 3.11: Highest Level of Education, County Kildare and State, 2011 -2022**



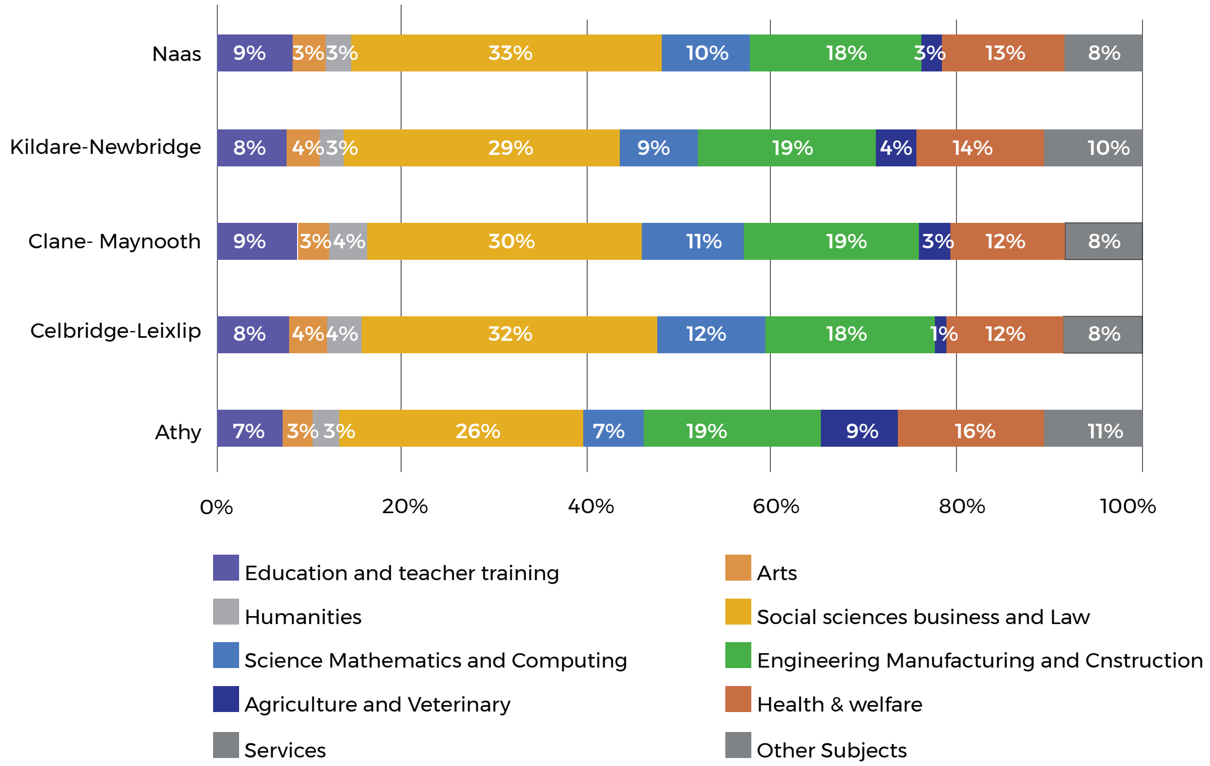

At MD level in 2022, Naas (56%) residents had the highest share of third-level graduates, followed by Celbridge-Leixlip (54%). The lowest levels of third-level graduates were recorded in Kildare-Newbridge (42%) and Athy (38%) (Figure 3.11).

**Figure 3.12: Highest Level of Education, MDs in County Kildare 2022**



The educational background of the population largely mirrors predominant economic sectors in the MDs. In 2016, the percentages of persons who studied 'Arts', 'Humanities', 'Social sciences, Business and Law' and 'Science, Mathematics and Computing' was generally higher in Naas MD, Celbridge-Leixlip MD and Clane-Maynooth MD than in Kildare-Newbridge MD and Athy MD. Conversely, the share of persons who studied 'Agriculture and Veterinary' was notably higher in Athy MD and 'Health and Welfare' was generally higher in both Athy MD and Kildare-Newbridge MD. 'Engineering, Manufacturing and Construction' was roughly the same for each of the five MDs (Figure 3.13).

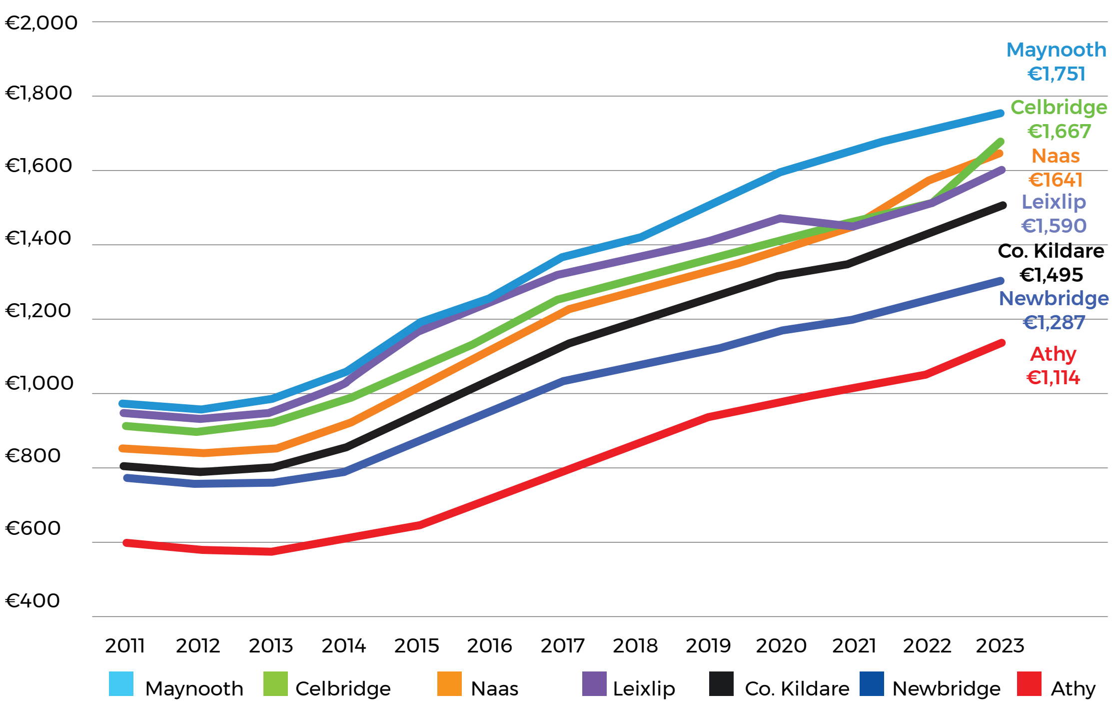
**Figure 3.13: Educational Background - Fields of study (2016)**




## 3.4 Housing Market

The housing market in County Kildare can be characterised as variable. As shown in Figure 3.14, over the period of 2011- 2023, rental prices for residential properties have increased between 71% in Newbridge and 104% in Naas, and by 89% in County Kildare overall. As of 2023, Maynooth and Celbridge had the highest average rent prices, while Athy and Newbridge had the lowest. The divergence highlights prices affected by proximity to the Dublin metropolitan area as well as higher prices in towns with larger populations such as Naas. Additionally, high average rental costs in Maynooth could also be the result of increased demand from students at Maynooth University.

Figure 3.14: Average Rental Prices for Locales in County Kildare, 2011-2023




In the housing sales market, the median price of a home in County Kildare rose by 87% between 2011-2023 (Figure 3.15– see page 36). This was lower than the rates of both County Dublin (92%) and the State (94%). In the past two years (2021-2023) growth rates slowed for both County Kildare and County Dublin. Over the same period, annual sales volume increased 518% in Kildare in comparison to the 2011 figure, more than 200% higher than that of County Dublin. As of 2023, the median price of a home in County Kildare is 7% higher than the national average while County Dublin is 32% higher

Future prices in the rental market are expected to increase based on recent trends. Figure 3.16 exhibits a projected increase in rental costs in County Kildare when calculated from the average of rental costs in the County from 2018-2023. Should these trends continue as projected, the average monthly cost for a rental property could increase from €1,173 in 2018 to €1,831 in 2031, an increase of 56% over the period.

**Figure 3.15: Home Sales: Volume of Sales and Median Prices, 2011-2023**

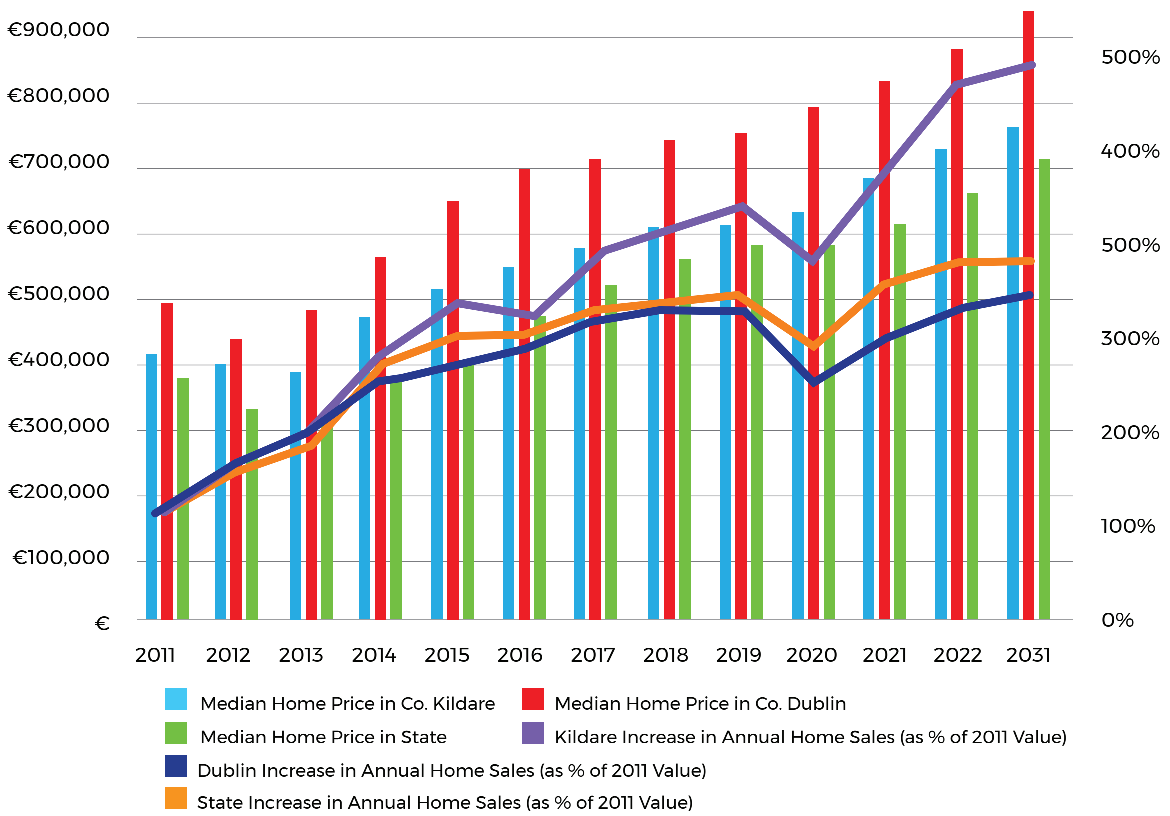
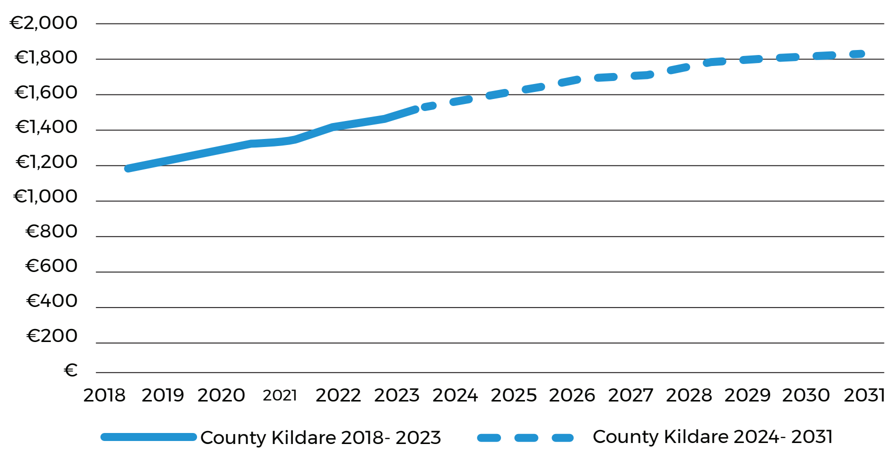
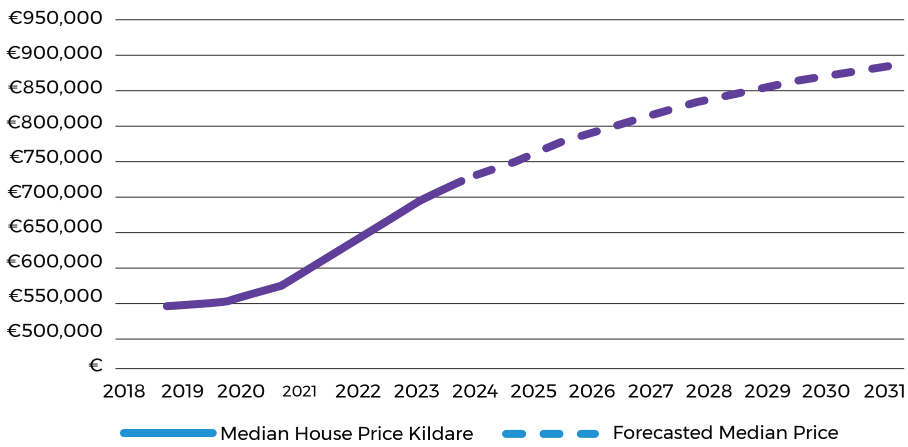



**Figure 3.16: Actual and Projected Rental Costs in County Kildare, 2018-2031**



The increase in sales of residential property to household buyers from 2018 to 2023 occurred at a lower rate in County Kildare compared to County Dublin while largely following the national trend. At the same time, sales prices continued on an upward trajectory with slowdowns noticeable in recent years. This trend might continue due to the risk of sales prices decoupling from available incomes. In a County Kildare forecast of median sale prices for residential properties that is based on past residential property transactions, and assuming a degressive growth factor of 15%, growth is expected to gradually fall from 4.7% (2018-2023 average) to 1.3% (2031), yielding a compound annual growth rate of 3.06% and a median sale price increase from €765,000 to €927,000 (Figure 3.17).

**Figure 3.17: Forecast of Median Sale Prices for Residential Properties**




## 3.5 Transport and Commuting

### 3.5.1 Current Transport Profile

**Private Motorised Transport**

The northern portion of County Kildare and its main settlement areas of Leixlip and Maynooth, are served by the M4 motorway, which branches off toward Mullingar and continues as the M6 connecting Dublin to Athlone and Galway. The M7 motorway enters the County and traverses generally southwest, serving Naas, before branching off into the M9 serving Kilcullen and Castledermot, and continuing through the County serving Newbridge, Kildare (Town) and Monasterevin. These motorways go on to connect Dublin with Cork, Limerick and Waterford. Approximately 70-80% of County Kildare's population live within 5 km of a motorway.

**National Public Transport (Rail and Coach)**

County Kildare is connected by national public transport routes to surrounding countries and all five major cities in Ireland. Irish Rail provide connections with major cities via the Intercity Rail service to and from Dublin Heuston Station, with stops in Sallins/Naas, Newbridge, Kildare (Town), Monasterevin, Athy (not all stops are served on all connections). Additional Commuter rail services link Dublin Heuston with Portlaoise via Hazelhatch/Celbridge, Sallins/Naas, Newbridge, Kildare (Town), and Dublin Connolly with Leixlip (Confey), Leixlip (Louisa Bridge) and Maynooth. Main cross-country coach lines that serve County Kildare are:

- Bus Éireann Local Bus Service Route 115 connecting Dublin City Centre with Kilcock on an approximatel every half-hour departure schedule.

- Bus Éireann Local Bus Service Route 115A connecting Mullingar (rail station stop) with Kilkock three times daily. Local Bus Service.

**Local Bus Service**

A portion of County Kildare is found in the Dublin Metropolitan Area, affording them service by Dublin Bus. This area is made up of the five EDs of Celbridge, Donaghcumper, Kilcock, Leixlip, Maynooth and Straffan.

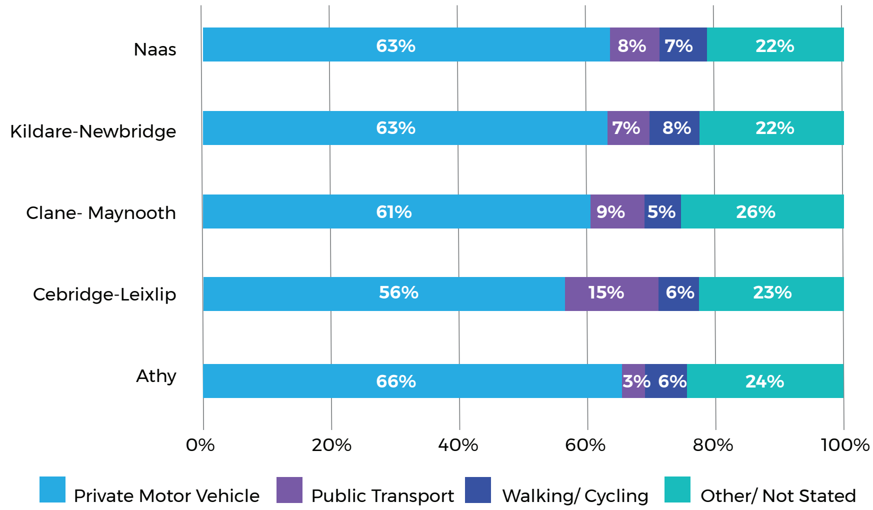
### 3.5.2 Current Commuting Profile

**Commuting**

The average commuting time for workers in Kildare was the second highest in the State at 34 minutes. 17% of workers' average commute over one hour. County Kildare has the sixth highest rate of outward commuting in the State, with most areas travelled to being located in the four local authorities within County Dublin.

In 2022 for County Kildare, the majority (62%) of persons commuting to work used private motor vehicles (including car driver, car passenger, motorcycle or scooter), followed by public transport at 8% (including train, DART or Luas, bus, mini-coach or coach), and walking/cycling (7%). Figures are relatively uniform between each MD, with a notable exception for Celbridge-Leixlip MD where the use of public transport is almost twice as high (15%) as the County average (Figure 3.18). This is likely due to the proximity of Celbridge-Leixlip MD to Dublin and the increased availability of public transport options for workers commuting to Dublin or working within County Kildare. The decreased rate of private motor vehicle usage corresponds with this observation.

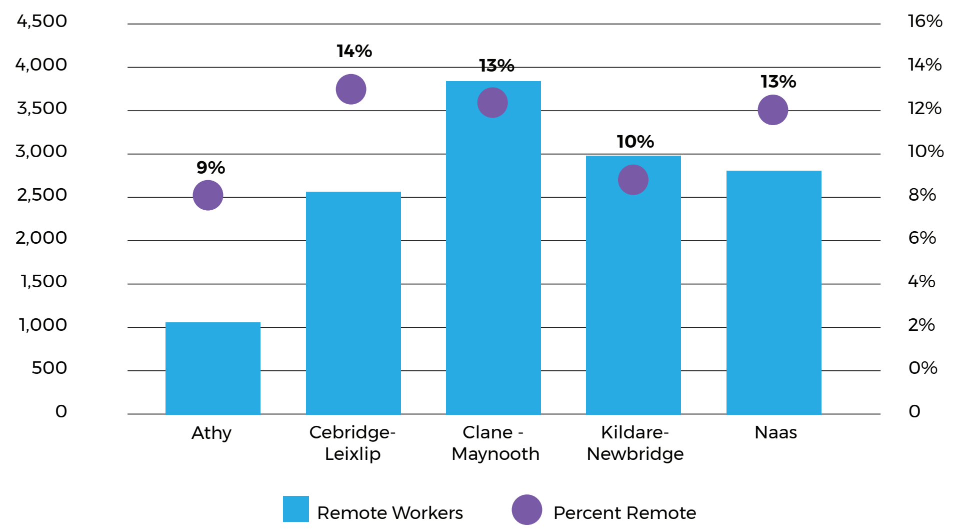
**Figure 3.18: Usually Resident Population by Means of Travel to Work, MDs, 2022**




**Remote Working**

Census 2022 data indicates that of residents at work in County Kildare, 11.8% of workers work primarily from home. This is a notable increase from the Census 2016 figure of 4.0%. Spatial analysis of those working remotely indicates the rate of working from home is fairly uniform throughout the County with concentrations observed in Celbridge-Leixlip MD, western Clane-Maynooth MD and Naas MD. Southern and eastern Clane-Maynooth MD have notably lower rates of remote working compared to the rest of the County. Considering MDs as a whole (Figure 3.19), Celbridge-Leixlip MD has the highest rate of remote working at 14%, followed by Clane-Maynooth and Naas MDs at 13%. Those at work in Kildare-Newbridge MD number 13% working at or primarily from home and in Athy 9% work in this manner.

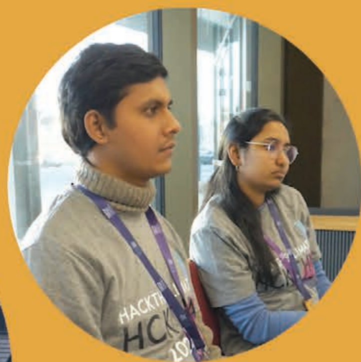
**Figure 3.19: Remote Workers by MD in County Kildare, 2022**




### Kildare Commuter Survey

The 2019 Kildare Commuter Survey indicated that 13% of those surveyed worked from home on an occasional basis and that 34% worked from home regularly. The Commuter Survey also notes that workers in the 'Cloud computing, computer programming & software, Game and app development' sectors were the highest reporting to be working remotely regularly at 27%. Workers in the banking and insurance sectors were the second highest at 25% of respondents indicating they regularly work from home. Understandably, those at work in the retail (82%), medical & healthcare (74%) and transport & logistics (74%) were the sectors with the highest percentage of respondents indicating they did not currently work remotely.

Differing percentages between the Census 2022 remote working figures and Kildare Commuter Survey remote working responses indicate the possibility of overrepresentation for certain professions where remote working is more likely in County Kildare.




STOP

# 4 Key Sector Analysis

This chapter provides detailed analysis of each of the identified six key sectors for County Kildare. Each of the sections briefly introduces the sector, outlining some key international trends as well as providing an overview of employment numbers and key occupational roles in the County from available CSO data. Projections for growth in employment in the sector are presented with base, high and low growth scenarios. The skills supply is then assessed through examination of the provision of relevant courses and training via education and training providers. Using the findings from the projections and the assessment of existing provision, the demand and required supply of skills is estimated.

***The analysis is detailed by sector in the sub-sections in the following order:***


## 4.1 Key Sector Analysis 1: Construction, Engineering & Energy

Companies working in the construction, engineering and energy sectors are an important contributor to County Kildare's economy. Taken as a whole, the sector is labour intensive covering a number of different areas and businesses, and also interconnected with a number of other sectors in the County from tech to logistics and food manufacturing. Globally, the sector saw disruption during the pandemic with project delays and cancellations also having a knock-on effect in relation to the availability of qualified staff.[1]

The construction sector has also seen rapid change with a growing focus on environmentally friendly practices and areas related to the green economy such as retrofitting and renewable energy. Similarly, the adoption of modern methods of construction has the potential to provide a pathway to building large scale housing developments in a more sustainable and viable manner with associated savings on cost. As such, skillsets and knowledge relating to Building Information Modelling, 3D printing, and prefabrication will be important.

Ensuring that there is an availability of a strong workforce for this key sector out to 2030 and beyond will be important for County Kildare's economy. This will include the provision of a pipeline of talent in the traditional trades as well as engineers that have the required knowledge and skills to support the key sector. Similarly, the upskilling of the existing workforce will be important to ensure that their skillsets reflect the changes and technological advances in sector, including in relation to sustainability and renewables. An overview and projects for the key sector are provided below.

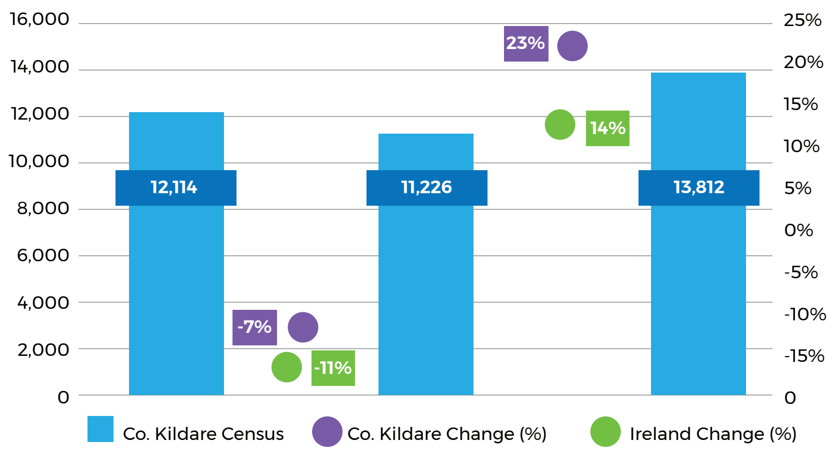
*[1] Associated General Contractors of America. Coronavirus Has Caused Significant Construction Project Delays And Cancellations, Yet Demand For Skilled Labor Is High, New Survey Finds (agc.org: AGC, 2020). https://www.agc.org/news/2020/09/02/coronavirus-has-caused-significant-construction-project-delays-and-cancellations-yet*

### 4.1.1 Sectoral Landscape in County Kildare

#### Workforce Profile

As detailed in Section 3.2, construction, engineering and energy is the second largest of the key sectors in Kildare. As of 2022, 11.2% of all persons in the labour force in County Kildare operated in the construction, engineering and energy sector. The sector includes a wide range of activities, such as elementary construction activities, building and civil engineering technicians, electricians and carpenters, mechanical engineers, architects and town planners, and metal workers.

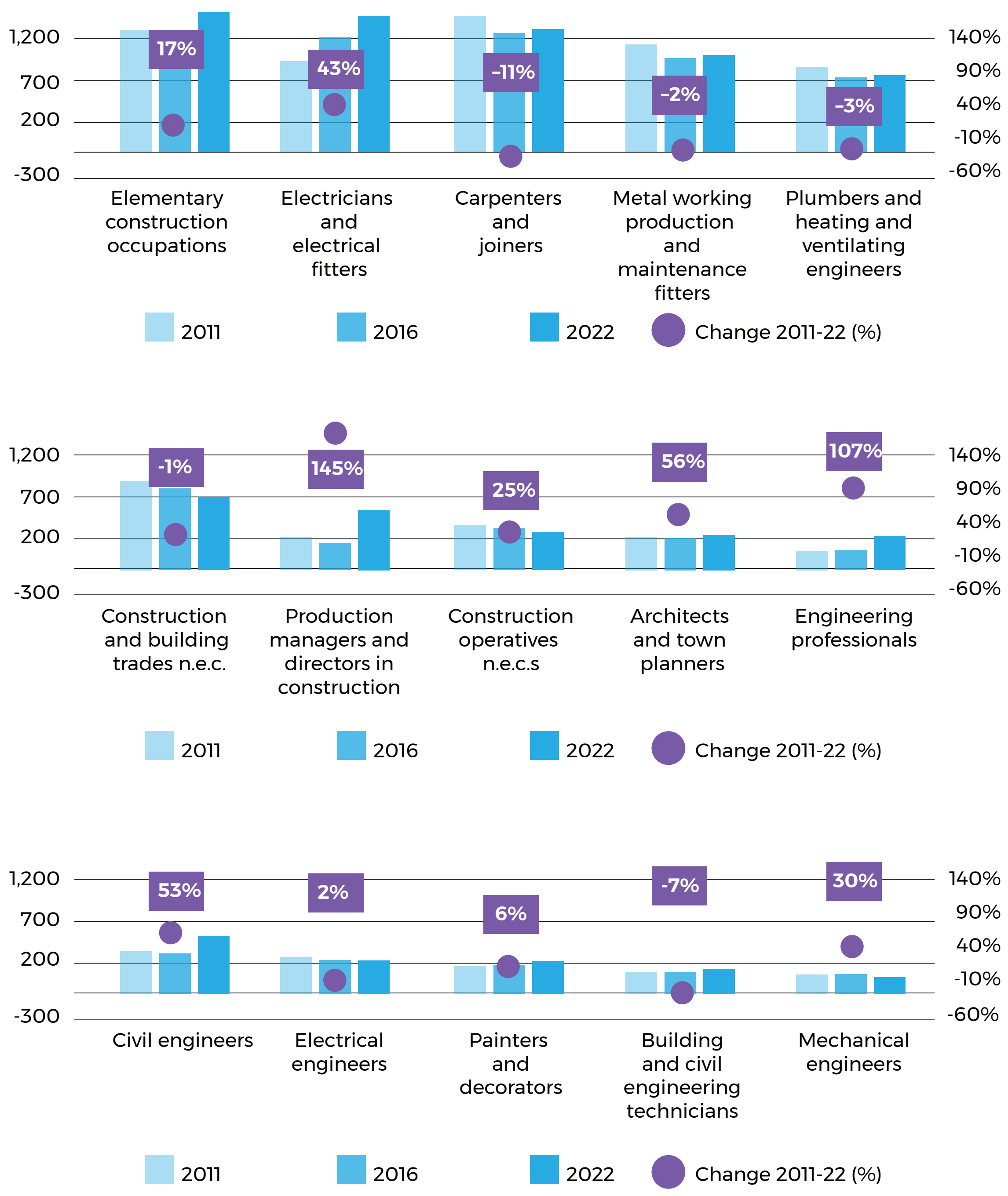
**Figure 4.1: Construction, Engineering & Energy Employment, 2011-2022**




Total employment in the sector can be further broken down into the 36 occupations[2], the largest 15 of which are Included in Figure 4.2. Between 2011 and 2022, only four of these occupations recorded a loss of employment, while the highest relative growth occurred among engineering professionals and production managers and directors within construction. The highest absolute growth occurred for electricians and electrical fitters followed by production managers and directors within construction. The increased numbers in full-time employment and high growth rates point to a rapidly growing sector that is also evolving, noting a decrease in some traditional occupations while others increase, particularly at the managerial level.

[2] *These figures include Co. Kildare residents employed in the 36 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare*

**Figure 4.2: Construction, Engineering & Energy Employment by Occupation, 2011-2022**



### 4.1.2 Projected Skills Demand

Potential 2030 employment figures in the construction, engineering and energy sector consider labour force trends, characteristics of the workforce, and sectoral trends (both national and local). Three diverging scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape and the volatility in recent employment trends, the scenarios presented below should be interpreted with a caveat related to the high degree of uncertainty they are characterised by.

Table 4.1 shows the number of people employed in County Kildare's construction, engineering and energy sector in 2022[3] and projected employment figures for 2030 under three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios as well as past employment levels (2011, 2016, 2022) in County Kildare are displayed in Figure 4.3. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.4.

**Table 4.1: Scenarios for Projected Skills Demand in Construction, Engineering & Energy**

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Growth Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| | High Growth | 17,679<br>12% | + 28% |
| 13,812<br>11.2% | Baseline | 15,746<br>10.7% | +14% |
| | Low Growth | 12,224<br>8.3% | -11.5% |

**Figure 4.3: Construction, Engineering & Energy Employment projections to 2030**

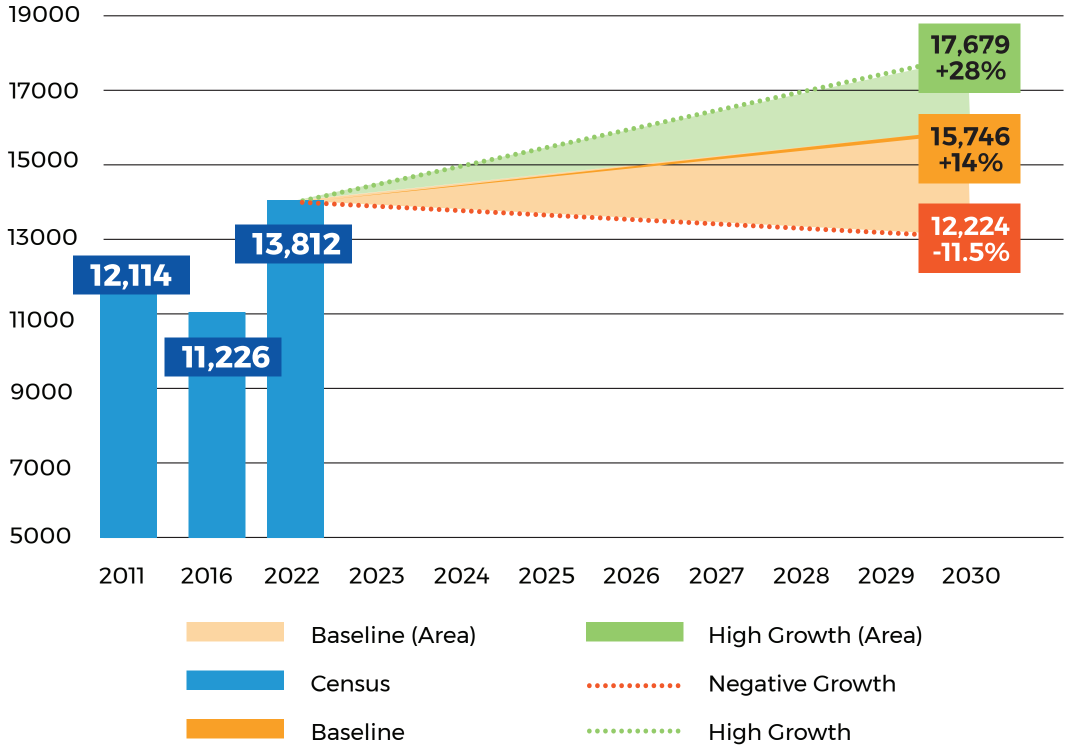
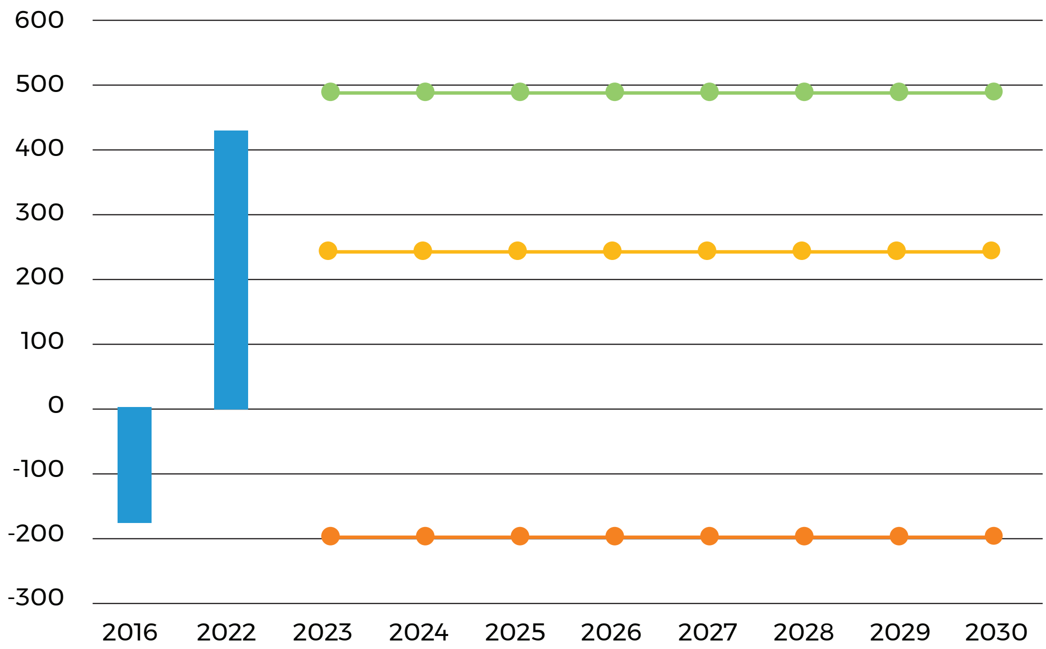


**Figure 4.4: Construction, Engineering & Energy - Employment Projections Annual Change, 2016-2030**




### Baseline Scenario

Under the **baseline scenario,** the sector is expected to continue expanding. Underlying assumptions for this scenario include:

- Continued sector development aligned with recent historical trends.
- Continuing lag in the provision of additional and affordable housing.
- An attractive business environment for existing firm expansion and location of new firms.
- Growth in energy sector due to ongoing clean energy transition.

The projected growth of the labour force implies an increase in the number of employees in construction, engineering and energy occupations by 14% (amounting to 1,934 persons) reaching 15,746 persons in 2030.[4] This scenario mirrors the consistent growth of the population and economy of Kildare. The yearly workforce change (i.e., skills requirements) over the 2023-2030 period is shown in Table 4.2.

As the total County Kildare labour force is expected to expand at an even higher rate over the projection period, the proportion of professionals in construction, engineering and energy employment is expected to decrease slightly from the 2022 level of 11.2% to 10.7% of the County labour force.

**Table 4.2: Baseline Scenario – Yearly Change in Construction, Engineering & Energy Occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +242 | +242 | +242 | +242 | +242 | +242 | +242 | +242 | **+1,934** |

[3] *Based on CSO Census 2022 data on Detailed Industrial Groups.*
[4] *The baseline growth scenario assumes growth from the 2011-2022 combined intercensal periods.*

### High Growth Scenario

The **high growth scenario** projects that employment in construction, engineering & energy will increase by 28% (3,867 persons) by 2030 which would increase the sector's proportion to 12% of the labour force.[5] The yearly workforce change over the 2023-2030 period is shown in Table 4.3. Underlying assumptions for this scenario include:

- Accelerated growth of the sector due to growth-oriented government policy, surpassing policy targets.
- Increased gravitational effect of the County as a destination for living and business resulting in increased levels of construction.
- Exceptional growth in energy sector through green jobs, increase in green infrastructure and establishing Kildare as a leading energy provider.

**Table 4.3: High Growth Scenario – Yearly Change in Construction, Engineering & Energy Occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +483 | +483 | +483 | +483 | +483 | +483 | +483 | +483 | **+3,867** |

### Low Growth Scenario

The **low growth scenario** assumes that the number of people employed in Construction, engineering & energy will decrease by 11.5% (amounting to a decline of 1,588 persons), falling to 8.3% of the County's labour force by 2030.[6] The yearly workforce change over the 2023-2030 period is shown in Table 4.4. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn or insecurity resulting in decreased construction activity and energy investment.
- Cyclical decline in housing sector similar to those experienced in 2008.
- Limited greenfield housing construction in County Kildare, limiting construction in that sub-sector.
- Limitation of large facility construction such as data hubs, or hub operators building facilities in other areas.
- Larger industry shift towards energy production not suited to the natural environment of County Kildare, such as offshore wind.

**Table 4.4: Low Growth Scenario – Yearly Change in Construction, Engineering & Energy Occupations**

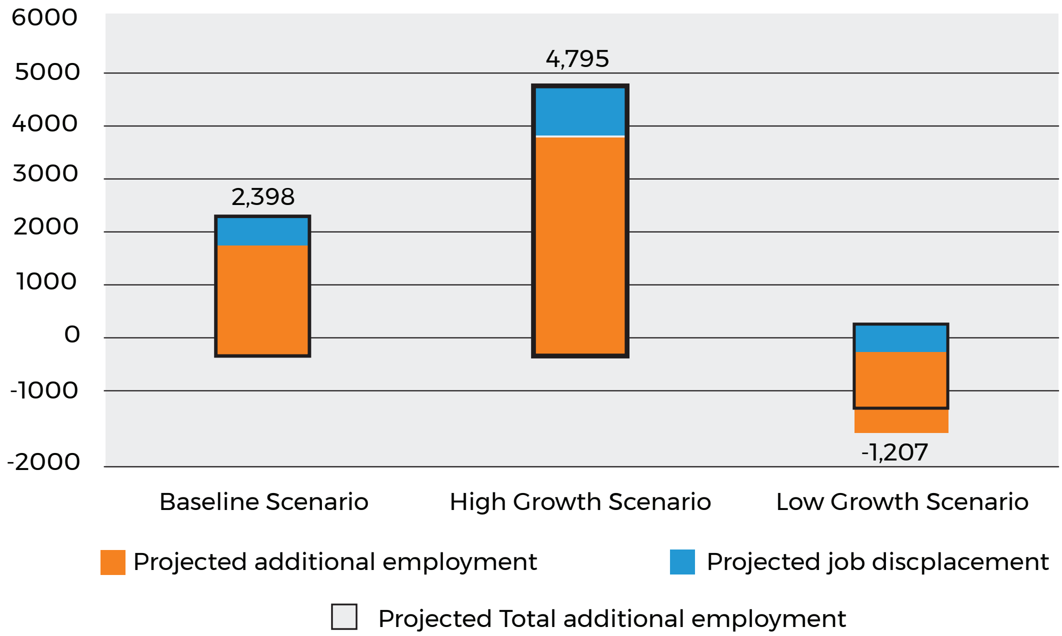
| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| -199 | -199 | -199 | -199 | -199 | -199 | -199 | -199 | **- 1,588** |

### Projected Employment and Displacement

Figure 4.5 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees due to displacement, the baseline scenario would assume a total of 2,398 additional jobs to 2030, the high growth scenario would assume a total of 4,795 and the low growth scenario would assume a loss of a total of 1,207 jobs.

5 *The high growth scenario is calculated as double the growth from the 2011-2022 combined intercensal periods.*
6 *The low growth scenario is calculated from the annual decrease from the intercensal 2011-2016 period.*

**Figure 4.5: Construction, Engineering & Energy – Projected Employment and Displacement, 2023-2030**

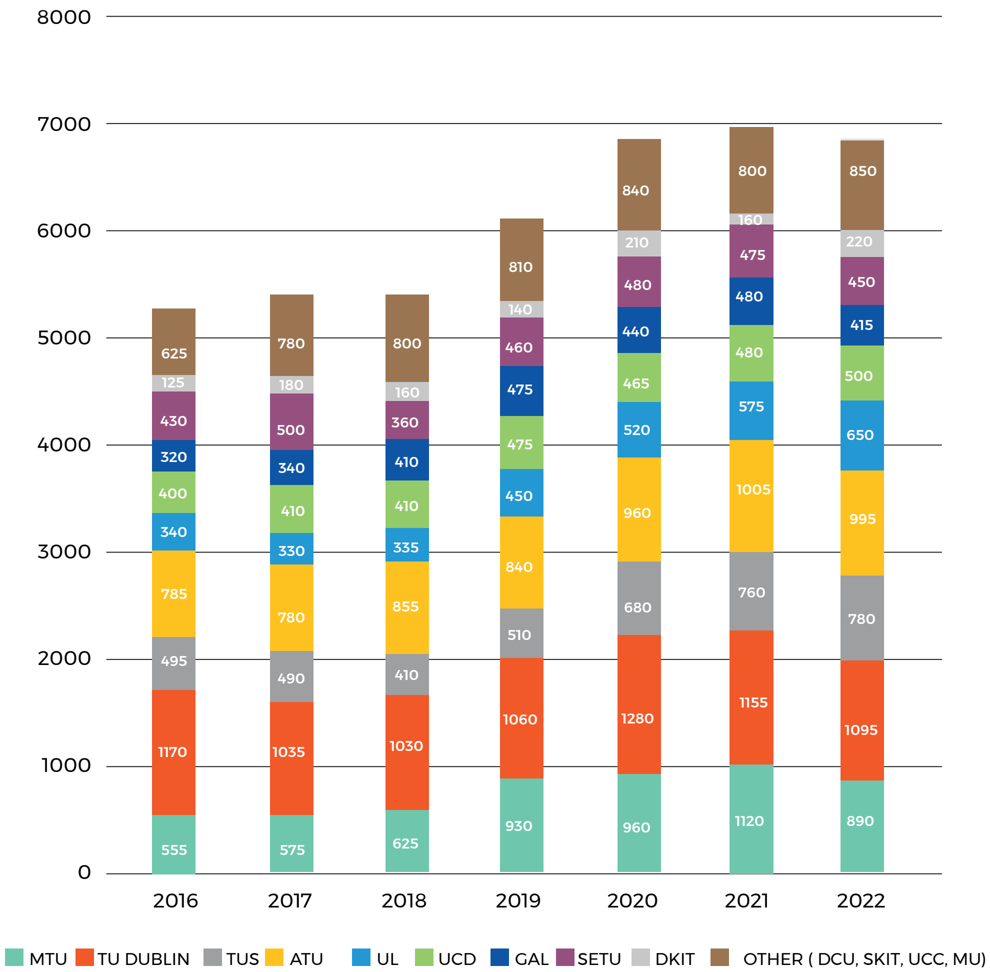



### 4.1.3 Skills Supply

From 2016 to 2022, the number of graduates in construction, engineering and energy -related fields[7] has fluctuated between 5,245 and 6,845, with a generally upward trend (see Figure 4.6). Nearly one-fifth of graduates (18%) came from TU Dublin, while over one-third of graduates come from either Munster Technological University (MTU), Technological University Shannon (TUS), or Atlantic Technological University (ATU). TU Dublin produced the most graduates over this period, remaining largely consistent with over 1,000 graduates per year, while MTU and TUS increased their number of graduates over this period by 60% and 58%, respectively. UL and DKIT have also increased their output of graduates in this sector. From 2016 to 2022, the share of graduates from HEIs based in the wider catchment of County Kildare (Dublin, Maynooth, Carlow/Waterford) has been decreasing slightly from 46% to 39%.

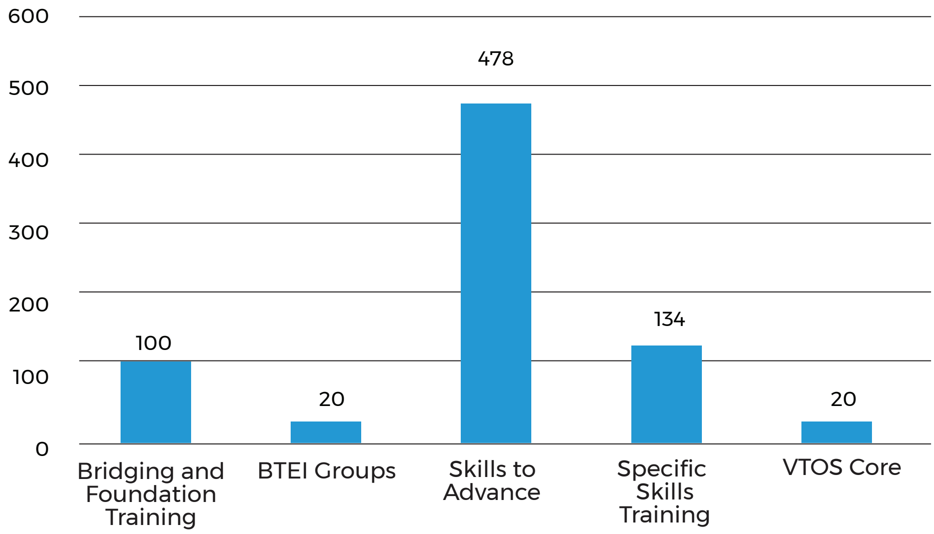
[7] *HEIs data related to programmes categorised under '(0710) Engineering and engineering trades not further defined or else where classified', '(0712) Environmental protection technology', '(0713) Electricity and Energy', '(0714) Electronic and Automation', '(0715) Mechanics and metal trades', '(0720) Manufacturing and processing not further defined or elsewhere classified', (0730) Architecture and construction not further defined or elsewhere classified' and '(0732) Building and civil engineering' are considered relevant for these statistics.*

**Figure 4.6: Graduates from HEIs in 2016-2022 in programmes related to Construction, Engineering & Energy**



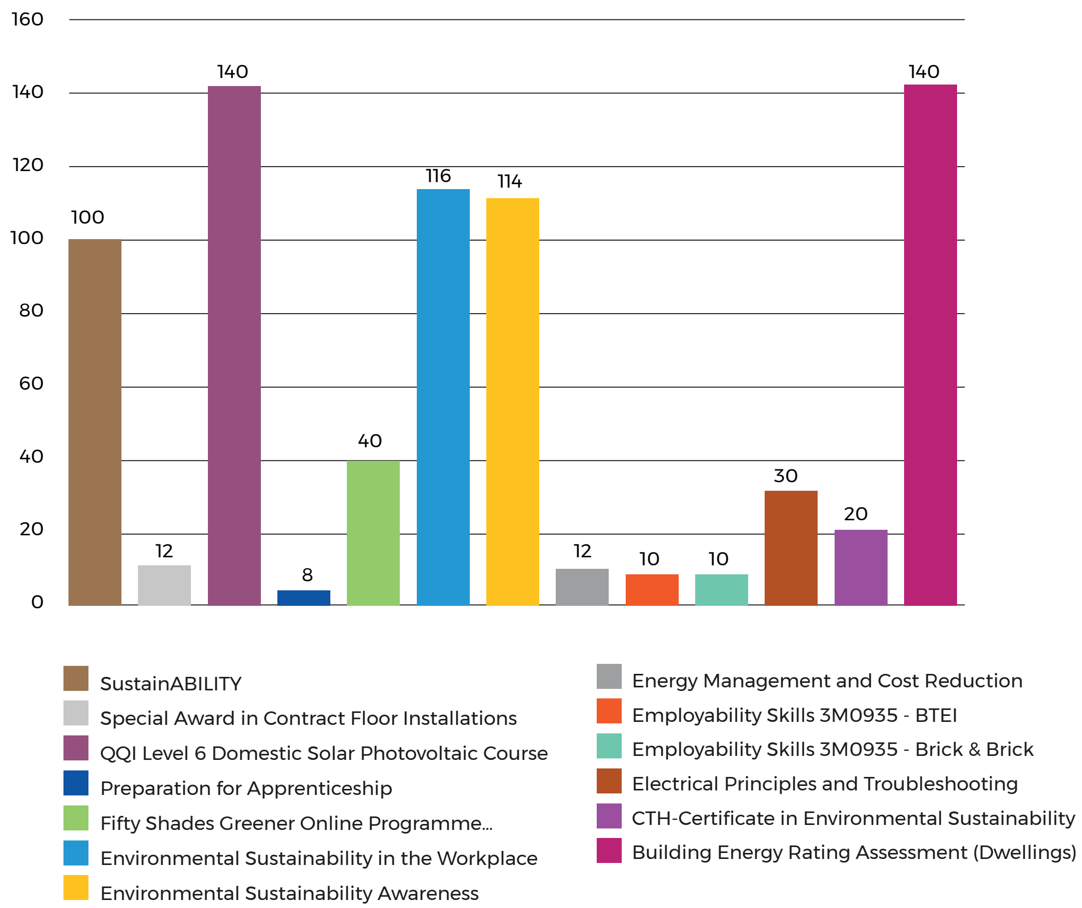

In addition to the courses offered in HEIs, numerous training courses and certificate programmes are offered to residents of County Kildare through the KWETB. The three largest categories of programme focus can be divided into 'skills to advance' with a capacity of 478, 'specific skills training' with a capacity of 134, and 'bridging and foundation training' with a capacity of 100 (Figure 4.7). Courses offered within these categories range from a focus on sustainability and green energy, construction employability skills (Skills to Advance programmes) and programmes relating to construction in the form of BER rating assessment and principles of electrical work (Specific Skills Training). The majority of courses, 80% of total capacity, are offered online with the remainder being offered in person in towns such as Athy, Celbridge, Curragh and Naas.

**Figure 4.7: Category of KWETB training courses relevant to Construction, Engineering & Energy**




The programme capacity for the construction, engineering and energy sector is the largest amongst the key sectors for provision of KWETB training courses with 752 total places. Capacity differs for each programme with the highest capacity of courses relevant to this sector including domestic solar panels and BER ratings, followed by environmental sustainability and green energy, with traditional trade courses and employability courses rounding out programme capacity (Figure 4.8).

**Figure 4.8: Capacity of KWETB training courses relevant to Construction, Engineering & Energy**



## Matching Skills Demand and Supply

The below figures comprise projections for an increase in skills training and supply based on the growth scenarios found in Section 4.1.2. Figure 4.9 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the construction, engineering & energy sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030.[8] Figure 4.10 illustrates the increased amount of programme capacity KWETB would need to produce to match demand in the sector in line with each of the projection scenarios to 2030.[9]

**Figure 4.9: HEI Skills demand and National Graduates Required in Construction, Engineering & Energy**

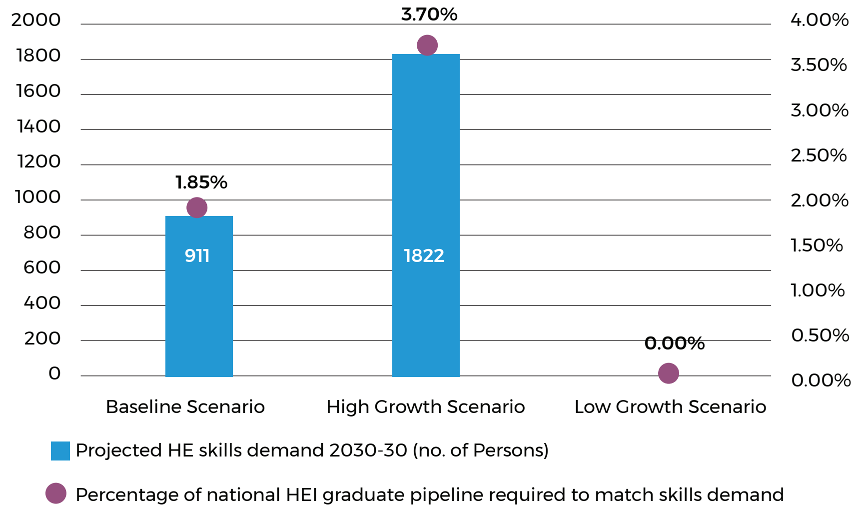
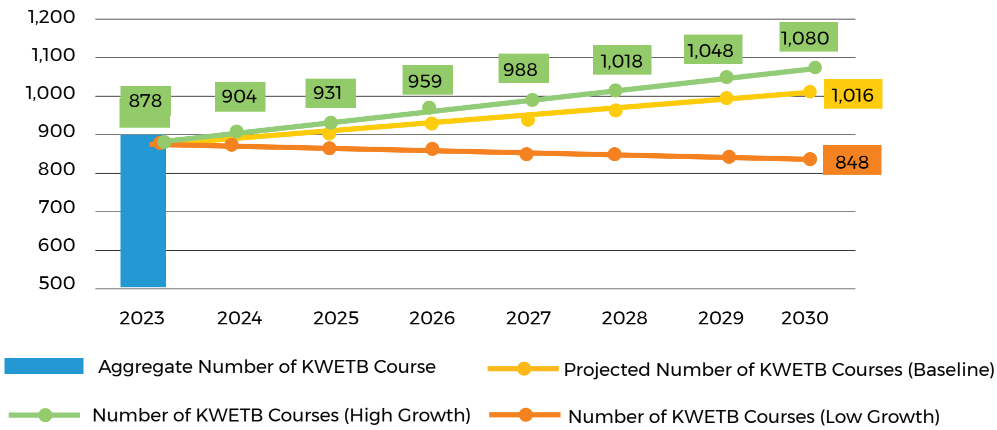



**Figure 4.10: Projected KWETB Courses Required in Construction, Engineering & Energy Sector, 2024-2030**




8 *In the Low Growth Scenario, the calculated required number of HE graduates is negative, however this value has been corrected to zero for clarity.*

9 *The percentage of persons with third level degree working in construction, engineering & energy is estimated at 65%. For the projection of the HE skills demand, it is assumed that 90% of HEI graduates in construction, engineering & energy related courses will commence a profession in the sector.*

## 4.2 Key Sector Analysis 2: Agriculture & Food Manufacturing

The key sector of agriculture and food manufacturing covers a range of activities, such as primary agriculture as well as food and drinks processing and manufacturing, fisheries, aquaculture and fish processing. Businesses active in the sector include both multinational companies as well as those involved in the farming community and smaller scale food producers. Internationally, it has been noted that there has been a decrease in the number of people working in agriculture, which has resulted in a 30% reduction in agriculture's share of the total employment in industrialised countries[10]. Similarly, one of the key trends post the Covid-19 pandemic is that Europe's agricultural sector is facing labour shortages. The changing trend from traditional dairy and meat-based consumption towards more sustainable food alternatives has an impact on associated professions.

At the same time, the sector is also becoming more data driven. This includes the adoption of precision farming which can be defined as ''the use of information technologies for the assessment of fine-scale animal and physical resource variability aimed at improved management strategies for optimising economic, social and environmental farming.[11] Therefore, the need for skills in areas relating to data analysis, robotics and the internet of things could increase.[12] Similarly, as food manufacturing becomes more automated the need for skills to operate and fix machinery will increase which may include skillsets associated with the traditional trades.

Overall, the agriculture and food manufacturing sector will likely continue to see an increasing focus on sustainability with an associated demand for skills related to this area including on how businesses in the sector can reduce their carbon footprint and their impact on the natural environment. An overview of the sector in County Kildare and the associated projections are outlined below.

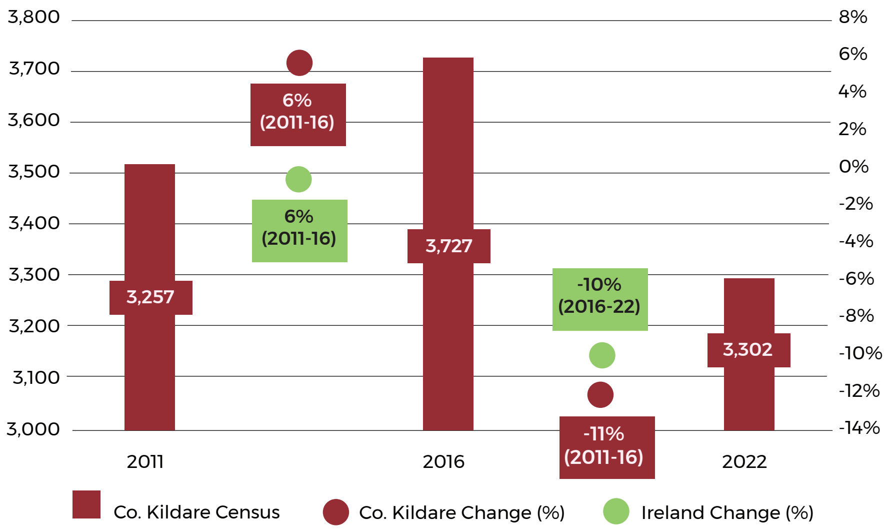
10 *Teagasc. Agriculture must work to meet skills and labour shortages (teagasc.ie: Teagasc, 2023). https://www.teagasc.ie/news--events/daily/dairy/agriculture-must-work-to-meet-skills-and-labour-shortages.php*
11 *Teagasc. Precision Farming Systems (teagasc.ie: Teagasc, 2017). https://www.teagasc.ie/animals/dairy/research/livestock-systems/precision-farming-systems/#:~:text=Precision%20farming%20systems%20have%20been,%2C%20social%2and%20environmental%20farming%22*
12 *World Economic Forum. Modern farming is as much about data as digging. Here are 3 emerging agricultural skills. (weforum.org, World Economic Forum, 2021). Modern farming is as much about data as digging. Here are 3 emerging agricultural skills | World Economic Forum (weforum.org).*

### 4.2.1 Sectoral Landscape in County Kildare

#### Workforce Profile

As of 2022, 3,302 persons were active in occupations considered under the agriculture & food manufacturing sector, representing 2.7% of the County's labour force. This figure is lower than for Ireland overall, where 4.1% of the labour force is active in agriculture & food manufacturing occupations. Figure 4.11 compares agriculture & food manufacturing employment in County Kildare and nationally over the last two intercensal periods. The decrease in employment below pre-pandemic levels in County Kildare in the recent 2016-22 period is in line with the national trend.

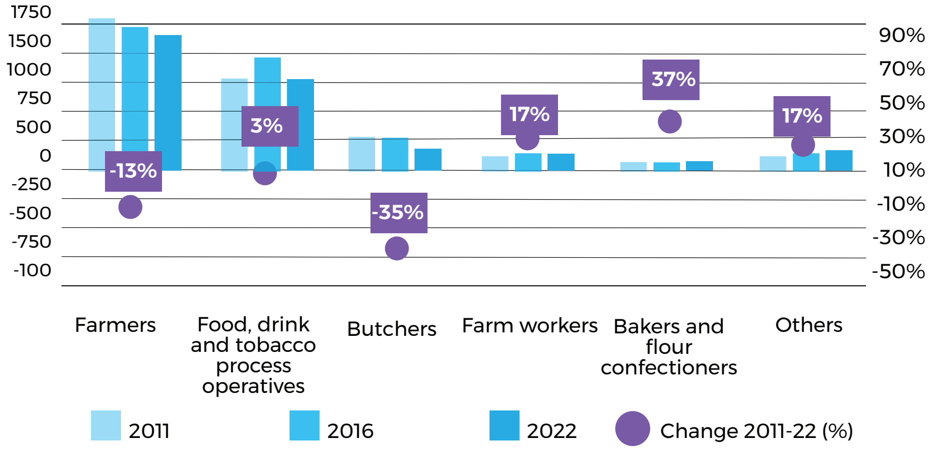
**Figure 4.11: Agri-Food Employment, 2011-2022**




Total employment in the sector can be further broken down into the 12 occupations[13] included in Figure 4.12. Between 2011 and 2022, three occupations recorded employment growth, with the highest absolute and relative growth registered among bakers and flour confectioners, and the highest absolute and relative decreases among farmers and butchers. Despite the decline, farmers and butchers still account for more than 50% of all employment in the sector. The numbers in employment and the low growth rates point to an established sector of significance that is undergoing some challenges.

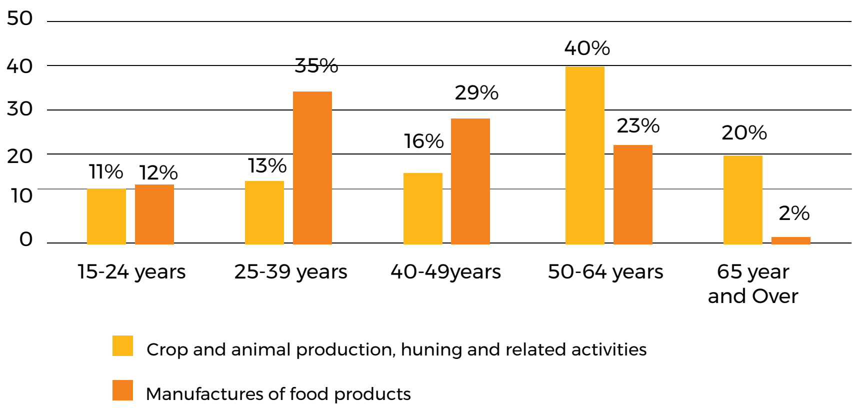
*[13] These figures include Co. Kildare residents employed in the 12 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare.*

### Figure 4.12: Agriculture & Food Manufacturing Employment by Occupations, 2011-2022




While demographic data on employees in the sector is not fully available, a clear distinction regarding the age profile can be made between 'manufacture of food products' where 64% of employed persons are between 25 and 49 years of age, and 'crop and animal production, hunting and related service activities' where 60% of employed persons are 50 years and above. The high average age in the agri-food subsector will require action on succession for business ownership and increased hiring activities in the coming years. In 2020, in the Mid-East & Dublin region (which County Kildare is part of) 49% of farms have a succession plan in place, higher than the national average of 46%.[14]

### Figure 4.13: Age breakdown of employees in agri-food (2022, Ireland)

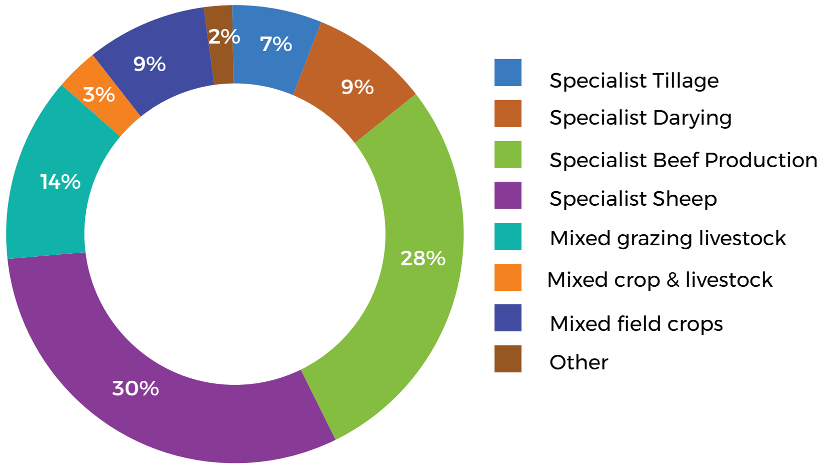



[14] *Agriculture Labour Force Census of Agriculture 2020 Detailed Results - Central Statistics Office*

## Crop Production and Livestock Farming

In 2020, there were 2,534 farms in County Kildare, a decrease of 1.7% since 2010. Over the same period, the number of farms in Ireland overall decreased by 3.4%. The average farm size in County Kildare is slightly above the national average, with a lower percentage under 100ha and a higher percentage of farms 100ha or more, in line with general characteristics for the Mid-East and South-East regions.

### Figure 4.14: Farming Activity Types in County Kildare, 2020




The total area farmed was 1,134 m2 (67% of the area of County Kildare), a lower percentage than for Ireland overall due to competing uses (e.g., higher settlement and infrastructure density, equestrian land) as well as geographical constraints (such as the presence of boglands). The share of total grassland (hay, sileage, pasture) is lower than for the State overall, while the production of cereals as well as horticulture are more significant in County Kildare (Figure 4.15).

### Figure 4.15: Distribution of Land Utilisation in County Kildare

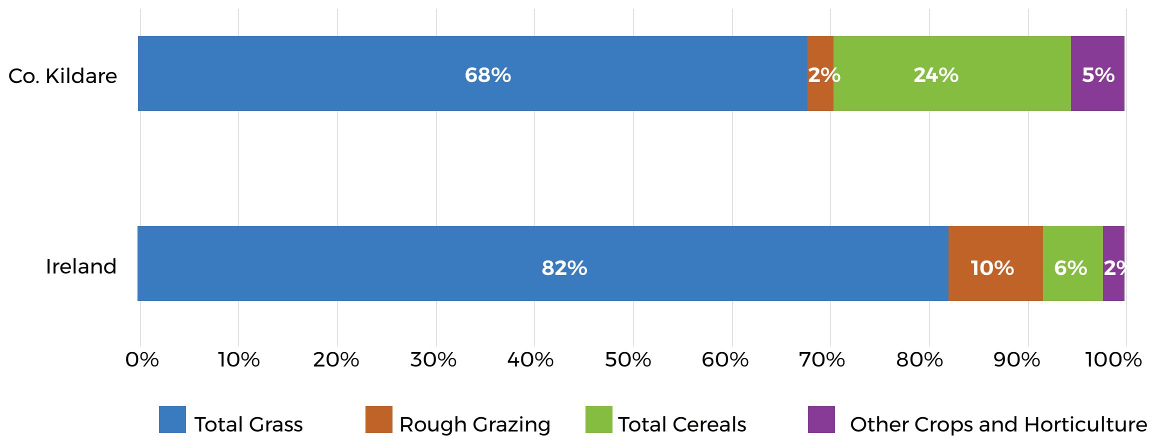



**Figure 4.15: Distribution of Land Utilisation in County Kildare**

## Food Production and Tourism

While crop production and livestock farming are less pronounced in County Kildare compared to the country overall, the sector generally offers well-established employment opportunities in micro and SME- (e.g., artisan and craft-food and beverage producers) and large-scale enterprises (e.g., subsidiaries of national and international companies). The sector is characterised by a growth in business activities: From 2019 to 2021 the number of active enterprises in 'Food products, beverages and tobacco' (which excludes the agricultural sector) increased from 64 (2019) to 69 (2020) to 77 (2021).[15]

County Kildare has a number of large-scale production facilities (particularly in Naas). Another major beverage production plant is currently planned in Newbridge. More recently, several small producers in the food and beverage industry have been established and gained market access across Ireland. With a strong focus on organic and healthy lifestyle products, many recently established brands are targeting sustainability-conscious customers. The food and beverage industry in Kildare is well-connected (e.g., through the "Flavours of Kildare Food Network") and supported by the Local Enterprise Office. The sector has seen several projects in recent years, most prominently the annual "Taste of Kildare" festival, and organised regular activities and participated in local (farmer's) markets.

The 'Kildare Food, Beverage + Hospitality Strategy'[16] identifies food and drinks production together with tourism and hospitality at the core of the Kildare brand identity. Similarly, Ireland's Ancient East tourism promotional strategy incorporates story-telling and experiential activities. Thus, Kildare's food landscape and food stakeholders have the potential to become a major 'stand out' on this tourism route as much of the food landscape and food heritage lends itself to experiential activities and storytelling.

### 4.2.2 Projected Skills Demand

Potential 2030 employment figures in the agriculture & food manufacturing sector examine labour force trends, characteristics of the workforce, and sectoral trends (both national and local). Three scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape, and the volatility in recent employment trends, the scenarios presented below should be interpreted with the caveat related to the high degree of uncertainty they are characterised by.

Table 4.5 shows the number of people employed in the County Kildare agriculture & food manufacturing sector in 2022[17] and projected employment figures for 2030 under three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios as well as past employment levels (2011, 2016, 2022) in County Kildare are displayed in Figure 4.16. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.17.

15 *https://data.cso.ie/table/BRA34*
16 *Kildare Food Beverage Hospitality Strategy 20212023.pdf (kildarecoco.ie)*
17 *Based on CSO Census 2022 data on Detailed Industrial Groups.*

**Table 4.5: Scenarios for Projected Skills Demand in Agriculture and Food Manufacturing Employment**

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| | High Growth | 3,895<br>2.7% | +18% |
| 3,302<br>2.7.% | Baseline | 3,598<br>2.5% | +9% |
| | Low Growth | 3,226<br>2.1% | -5% |

**Figure 4.16: Agri-Food – Past and Projected Employment Trends, 2011-2030**

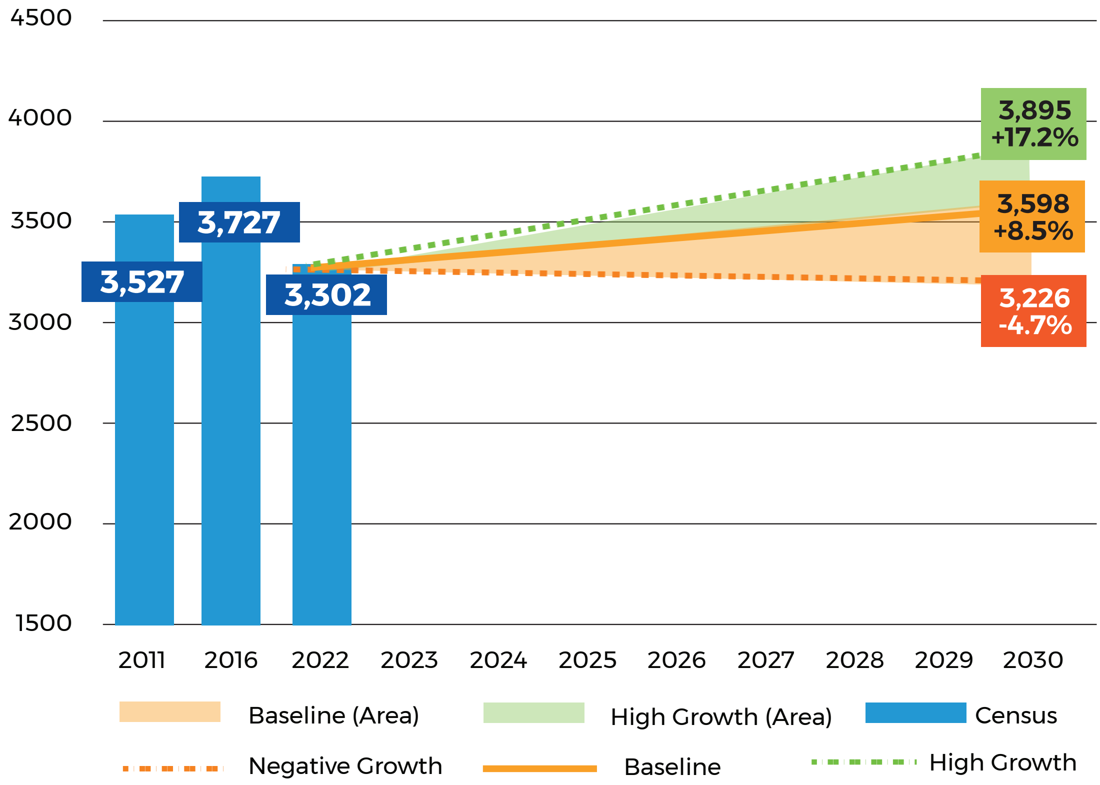
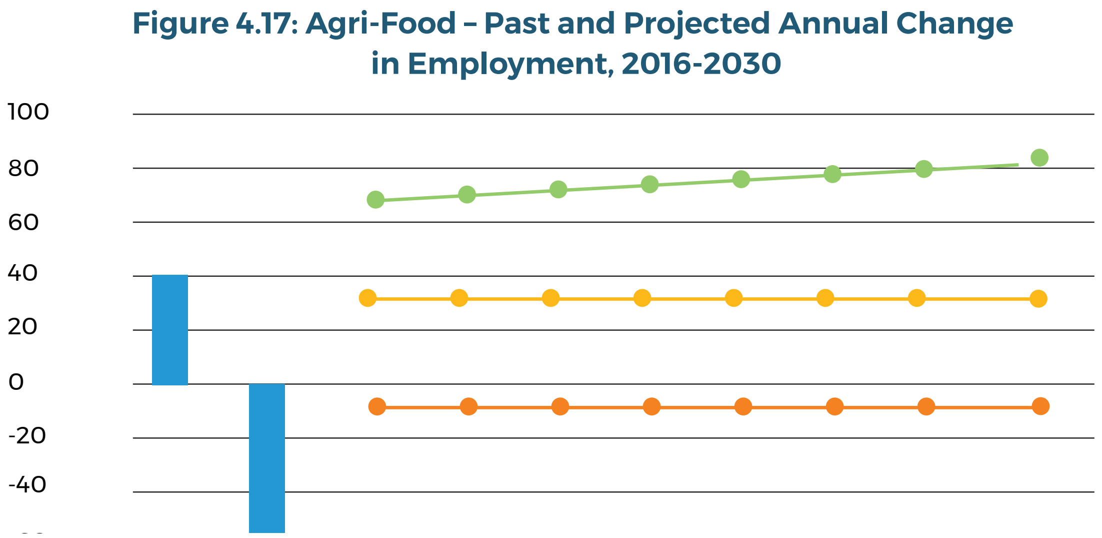


**Figure 4.17: Agri-Food – Past and Projected Annual Change in Employment, 2016-2030**




## Baseline Scenario

Under the **baseline scenario,** the sector is expected to expand. Underlying assumptions for this scenario include:

- moderate growth of the sector overall due to strong demand in relation with an increasing population.
- Further diversification of the sector due to continued cooperation through existing networks for micro and small-and-medium-sized enterprises.
- Limited levels of growth due to continuously high cost of living and limited access to housing and transport.

The projected growth of the labour force implies an increase in the number of employees in agri-food occupations by 9% (amounting to 296 persons) reaching 3,598 persons in 2030.[18] The yearly workforce change over the 2023-2030 period is shown in Table 4.6.

As the total County Kildare labour force is expected to expand at an even higher rate over the projection period, the proportion of professionals in agriculture and food production employment is expected to decrease slightly from the 2022 level of 2.7% to 2.5% of the County labour force

**Table 4.6: Baseline scenario – Yearly change in the number of agri-food employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +36 | +36 | +36 | +37 | +37 | +38 | +38 | +38 | **+296** |

[18] *The baseline scenario growth figure is derived from the growth during the 2011-2016 intercensal period and calculate out over the projected period.-.*

### High Growth Scenario

The **high growth scenario** assumes that employment in agri-food will increase significantly by 18% (593 persons) and will reach 2.7% of the County's labour force in 2030[19]. The yearly workforce change over the 2023-2030 period is shown in Table 4.7. Underlying assumptions for this scenario include:

- Strong growth of the sector overall due to strong demand.
- Further growth and diversification of the sector due to continued FDI and increased cooperation through existing and new networks for micro and small-and-medium-sized enterprises, as well as improved access to incentives to start and grow businesses.
- Improvements in infrastructure around housing and transport ensure continued competitiveness of County Kildare compared to other locations.

**Table 4.7: High Growth Scenario – Yearly change in the number of agri-food employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +66 | +68 | +70 | +73 | +75 | +78 | +80 | +83 | **+593** |

### Low Growth Scenario

The **low growth scenario** assumes that the number of people employed in agri-food will decrease by 9% (amounting to a decline of 298 employees), falling to 2.0% of the County's labour force by 2030.[20] The yearly workforce change over the 2023-2030 period is shown in Table 4.8. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn, or insecurity because of a sectoral crisis which could lead to  existing enterprises exiting the market and prevent new enterprises from being established.
- Reversal in the sectoral diversification due to lower investment, disrupted cooperation networks and difficult a ccess for entrepreneurs to start and grow businesses.
- Failure to attract sufficiently enough younger persons into the Crop and animal production subsector to balance the number of retiring persons.
- A decreasing level of competitiveness of County Kildare as a business location compared to other regions and countries due to high cost of living and limited access to housing and transport.

19 *The high growth scenario growth figure is calculated as double the growth from the 2011-2016 combined intercensal periods.*
20 *The low growth scenario growth figure is derived from the 2011-2022 intercensal periods and calculated out over the projected period.*

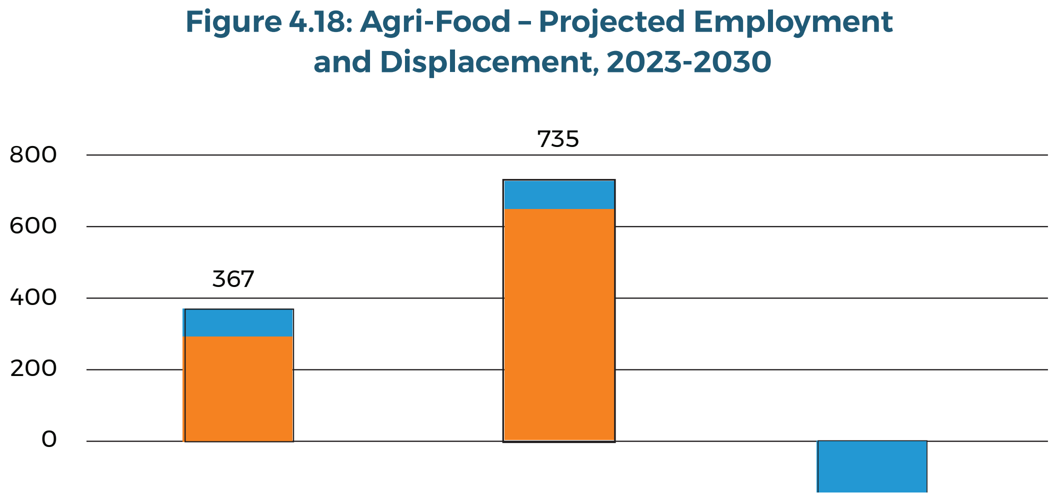
**Table 4.8: Low growth scenario – Yearly change in the number of agri-food employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| -20 | -20 | -19 | -19 | -19 | -19 | -19 | -19 | **-154** |

### Projected Employment and Displacement

Figure 4.18 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees due to displacement, the baseline scenario would assume a total of 367 additional jobs to 2030, the high growth scenario would assume a total of 735 and the low growth scenario would assume a loss of a total of 191 jobs

**Figure 4.18: Agri-Food – Projected Employment and Displacement, 2023-2030**

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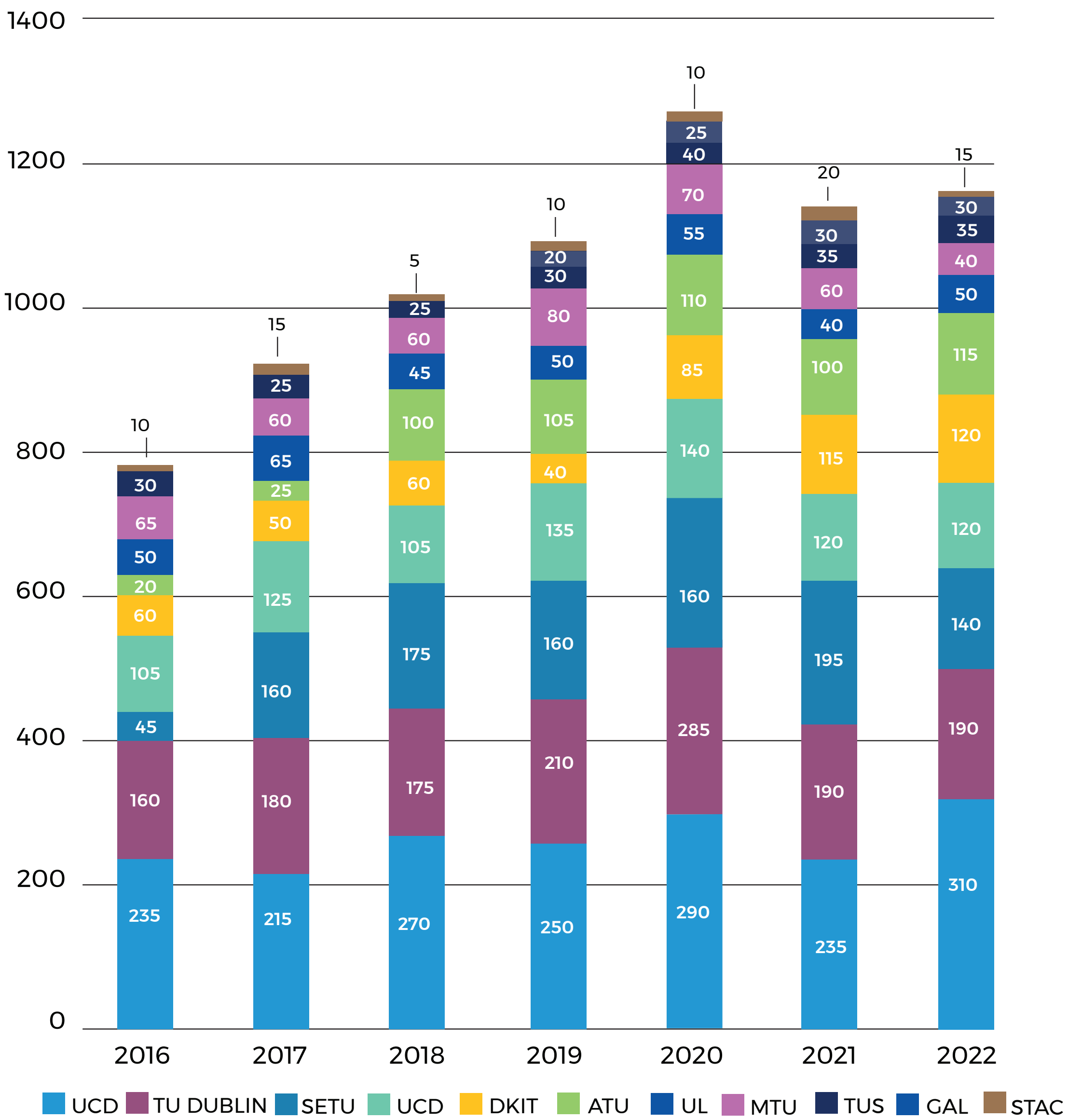
### 4.2.3 Skills Supply

From 2016 to 2022, the number of graduates in agriculture and food manufacturing-related fields21 has fluctuated between 780 and 1,270, with a generally upward trend (Figure 4.19). About two thirds of graduates came from University College Dublin (UCD), TU Dublin, South-East Technological University (SETU) and University of Cork (UCC). While UCD produced the highest number of graduates throughout the years with an increasing trend, SETU and DKIT have also been gaining ground. From 2016 to 2022, the share of graduates from HEIs based in the wider catchment of County Kildare (Dublin, Dundalk, Maynooth, Carlow/Waterford) has varied from 61-67%.

*21 HEIs data related to programmes categorised under '(0812) Horticulture', '(0721) Food processing', '(0819) Agriculture not further defined or elsewhere specified', '(0831) Fisheries', '(0841) Veterinary' are considered relevant for these statistics.*

While employment in the agriculture and food manufacturing sector does not exclusively rely on graduates from HEIs, the general growth trend of HEI graduates in Figure 4.19 (with 2020 being an outlier) indicates a healthy trend of future available workforce in this field. At the same time, there is an existing and potentially continuing trend of graduates in food processing and other fields starting employment in or change employment to other industries where similar skillsets are required (most notably, pharmaceutical industry).

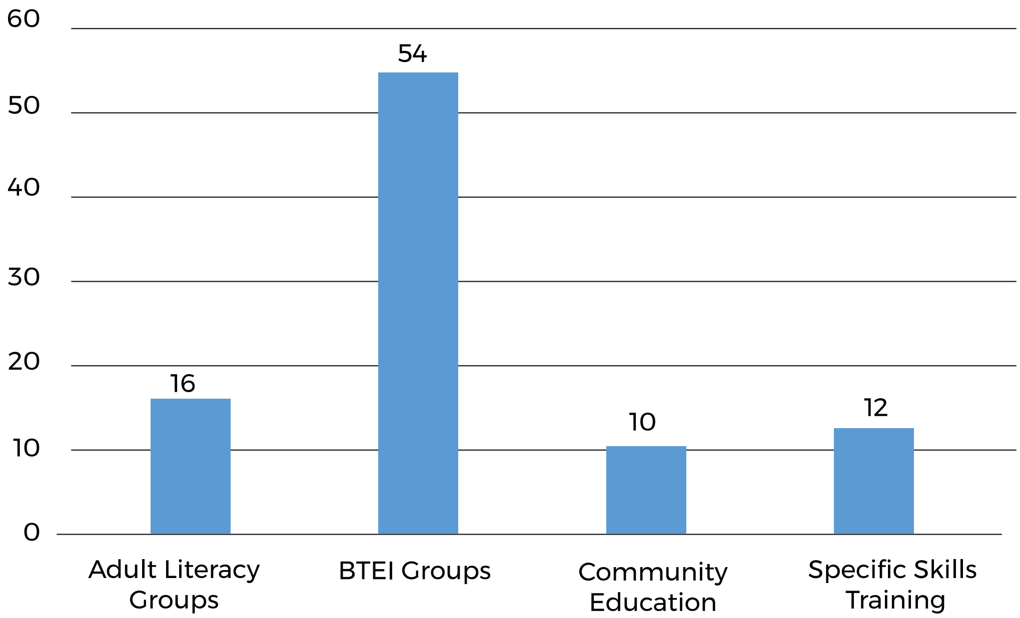
**Figure 4.19: HEIs Graduates – Agriculture and Food Manufacturing Programmes**




*Source:* [Higher Education Authority data.]

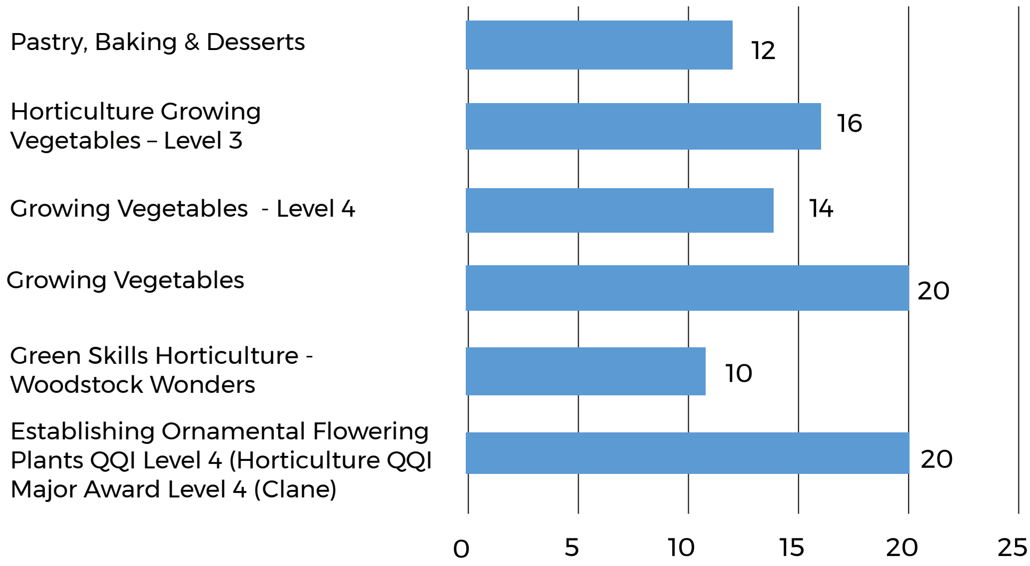
In addition to the courses offered in HEIs, numerous training courses and certificate programmes are offered to residents of County Kildare through the KWETB. The largest category of programme focus is 'Back to Education (BTEI) initiative' with a capacity of 54 (Figure 4.20). Courses offered within all categories include programmes focusing on horticulture, ornamental flowering plants, growing vegetables, and pastry, baking & desserts. 43% of course capacity is offered in Clane, 33% in Kildare Town, the remaining capacity is offered in Naas and Athy.

**Figure 4.20: Category of KWETB training courses relevant to Agriculture and Food Manufacturing**




In relation to the provision of KWETB training courses, the programme capacity for the agriculture and food manufacturing sector is low compared to other key sectors (total of 92 places). Capacity differs for each programme with the highest capacity of courses relevant to this sector including growing vegetables (various levels) and ornamental flowering plants (Figure 4.21).

**Figure 4.21: Capacity of KWETB training courses relevant to Agriculture and Food Manufacturing**



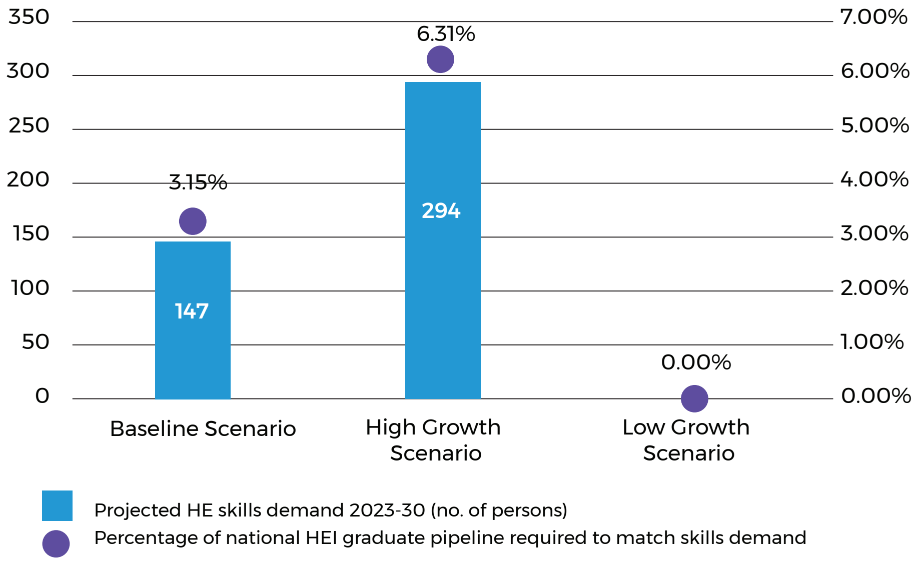

## Matching Skills Demand and Supply in the Sector

The below figures outline projections relating to a potential need for an increase in skills training and supply based on the growth scenarios found in Section 4.2.2. Figure 4.22 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the agriculture and food manufacturing sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030.[22] Figure 4.23 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.[23]

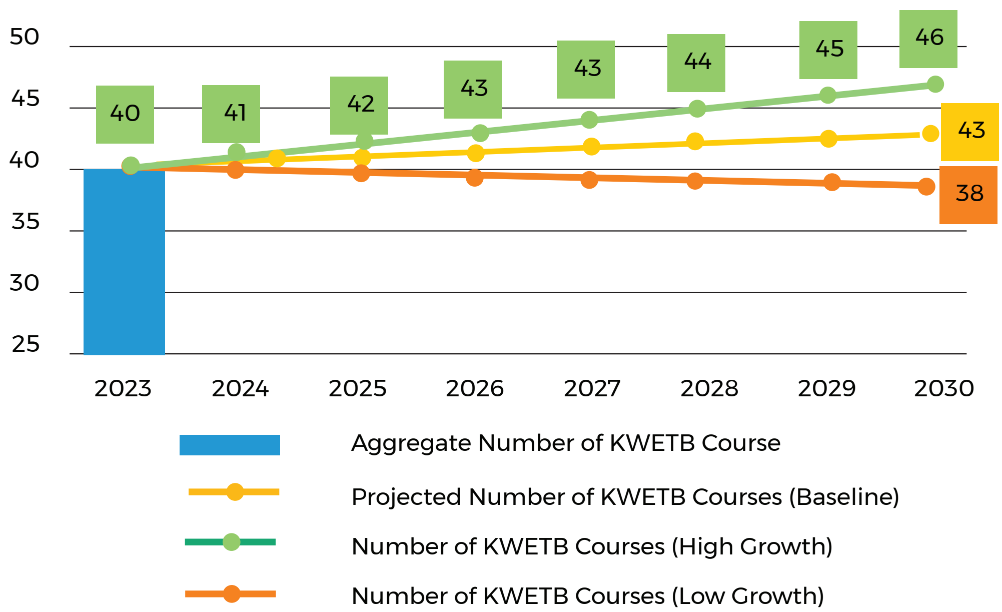
*[22] In the Low Growth Scenario, the calculated required number of HE graduates is negative, however this value has been corrected to zero for clarity.*

*[23] The percentage of persons with third level degree working in agriculture and food manufacturing is estimated at 40%. For the projection of the HE skills demand, it is assumed that 50% of HEI graduates in agriculture and food manufacturing related courses will commence a profession in the sector.*

### Figure 4.22: HEI Skills demand and National Graduates Required in Agri-Food




### Figure 4.23: Projected KWETB Courses Required



## 4.3 Key Sector Analysis 3: Tourism, Hospitality, Leisure & Retail

Tourism, hospitality, leisure, and retail businesses contribute significantly to the economy in County Kildare and also provide a substantial level of employment; the largest of the six key sectors that this strategy covers. Looking at trends at the international level, a post-pandemic recovery in tourism is evident. Tourism's contribution to global GDP increased by 22% in 2023 with the sector worth $7.7 trillion, although this is still 23% behind its 2019 peak.[24] Despite the apparent recovery, staff shortages remain an issue as noted in a 2023 report by the World Travel & Tourism Council.[25] The continuing issues with the recruitment and retention of staff across the tourism and hospitality sector have also been noted nationally, although some slight improvements are becoming visible in comparison to pandemic and immediate post-pandemic [26] years 2020-2022. Similarly, in retail, the retention issues with staff are well documented both nationally [27] and internationally, with a report suggesting turnover of staff in US retail could be as high as 60%.[28]

The need to train and upskill the workforce in this key sector is also evident. A significant study on digital skills in the tourism and hospitality sector across Europe found that there was a significant gap in digital skills in the sector including in relation to operating systems, marketing, social media and general IT skills.[29] Furthermore, IBEC's 'Retail Technologies and Future Skills Report' noted that embracing new technology would be key for the retail sector in Ireland, with varying levels of adoption evident and an increasing need for higher skilled staff in the sector.[30] Therefore, the attraction and upskilling of staff will be vital for the tourism, hospitality, leisure and retail businesses particularly as the sector looks to embrace innovation and new technologies to ensure that it remains competitive and viable. The below sections provide an overview and projections for the sector in County Kildare.

24 *World Travel & Tourism Council. Travel & Tourism Economic Impact 2023. 647df24b7c4bf560880560f9_EIR2023-APEC.pdf (website-files.com)*

25 *World Travel & Tourism Council. Travel & Tourism Economic Impact 2023. 647df24b7c4bf560880560f9_EIR2023-APEC.pdf (website-files.com)*

26 *Failte Ireland. Tourism Careers Research 2023 Update. (failteireland.ie, Failte Ireland, 2023). PowerPoint Presentation (failteireland.ie)*

27 *Retail Ireland Skillnet. The Hidden Costs of Employee Turnover in Retail: A Deep Dive. (retailirelandskillnet.com, Retail Ireland Skillnet, 2024). The Hidden Costs of Employee Turnover in Retail: A Deep Dive - Retail Ireland Skillnet*

28 *McKinsey & Company. How retailers can attract and retain frontline talent amid the Great Attrition. (mckinsey.com, McKinsey & Company, 2022). Frontline retail workers and the Great Attrition | McKinsey*

29 *Carlisle, Ivanov, and Dijkmans (2023). The digital skills divide: evidence from the European tourism industry. Journal of Tourism Futures 9(2): 240-266. Available at: The digital skills divide: evidence from the European tourism industry | Emerald Insight.*

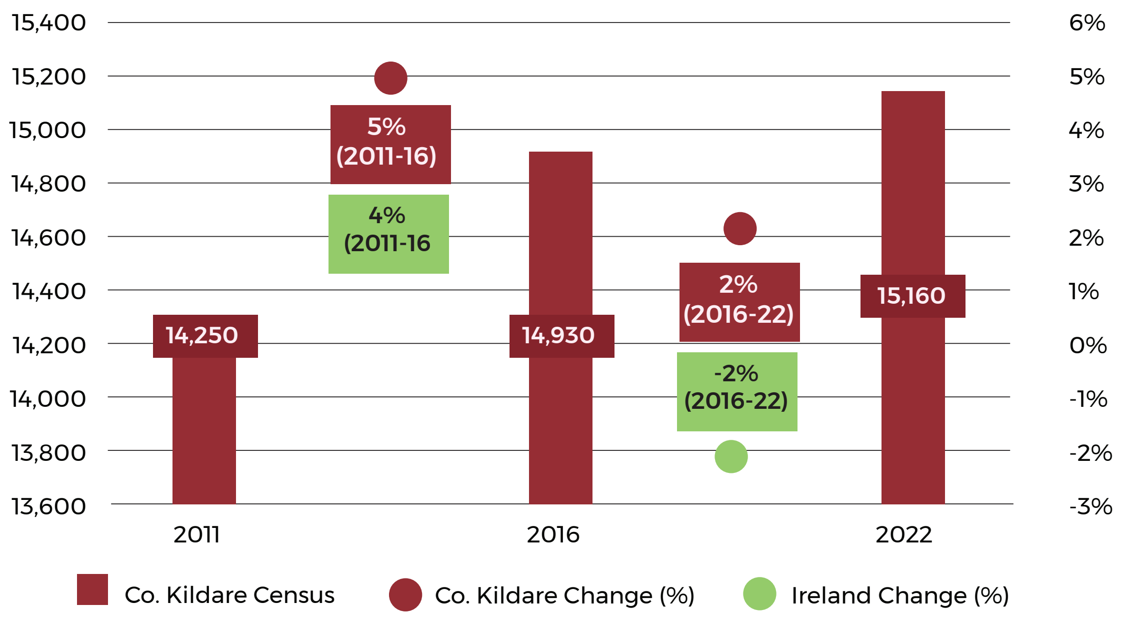
30 *Retail Ireland Skillnet. Retail technologies and Future Skills Report. (retailirelandskillnet.com, Retail Ireland Skillnet, 2020). https://retailirelandskillnet.com/report*

### 4.3.1 Sectoral Landscape in County Kildare

#### Workforce Profile

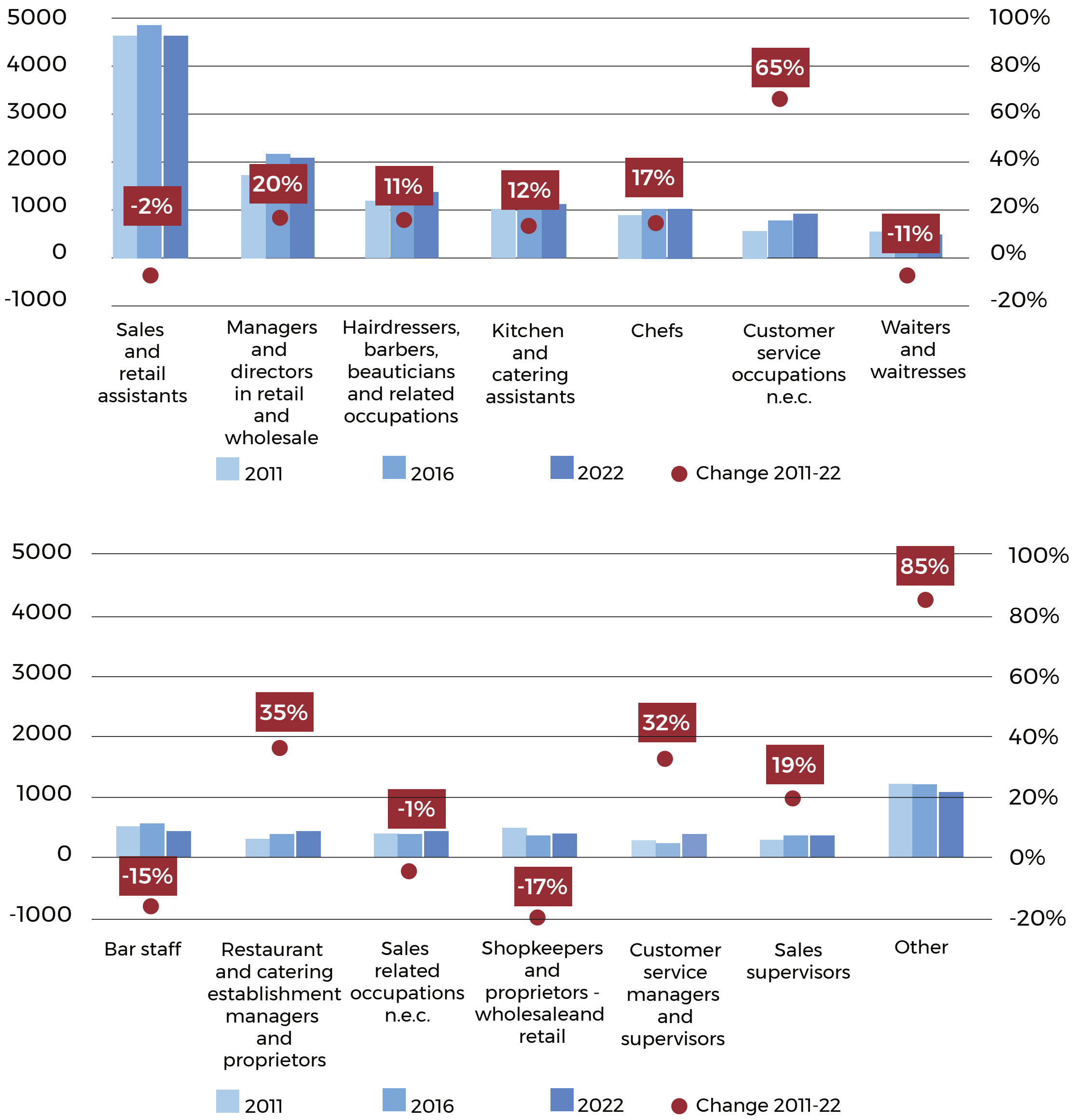
As detailed in Section 3.2, tourism, hospitality, leisure, and retail is the largest business sector analysed, and employs a significant portion of the County Kildare labour force (12.2%). Due to the diversity within the service industry, the sector includes a wide range of activities,[31] predominantly 'sales and retail assistants', 'managers and directors in retail and wholesale', as well as 'hairdressers, barbers, beauticians and related occupations', accounting for a combined 53% of all employees in the sector. Regarding the trend in employment, primarily activities involving managerial and supervisory responsibilities have seen an increase, while particularly activities involving roles without managerial and supervisory responsibilities have seen a decrease.

**Figure 4.24: Employment, 2011-2022**




[31] *These figures include Co. Kildare residents employed in the 24 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare.*

**Figure 4.25: Tourism, Hospitality, Leisure & Retail by Occupation, 2011- 2022**




County Kildare boasts significant retail facilities including shopping centres in its larger towns Naas, Newbridge, and Maynooth, as well as the Kildare Village outlet. Notable tourist destinations include heritage sites as part of Ireland's Ancient East, forests and woods, sports sites (particularly golfing and horse racing), Kildare Village, the National Stud, Newbridge Silverware, and others. The 'Thoroughbred Country Destination Experience Development Plan' sets out a strategy for Kildare and Tipperary for the further development of the equestrian industry and its linkage with tourism and hospitality. All four sub-sectors, tourism, hospitality, leisure, and retail are interwoven, and benefit from the proximity to Dublin and Dublin Airport, and the central location in the country.

The 'Kildare Food, Beverage + Hospitality Strategy'[32] links the various elements to the core of the Kildare brand identity. Similarly, Ireland's Ancient East tourism promotional strategy incorporates story-telling and experiential activities.

32 [Kildare Food Beverage Hospitality Strategy 20212023.pdf (kildarecoco.ie)]


### 4.3.2 Projected Skills Demand

Potential 2030 employment figures in the tourism, hospitality, leisure, and retail sector consider labour force trends, characteristics of the workforce, and sectoral trends (both national and local). Three scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape and the volatility in recent employment trends, the scenarios presented below should be interpreted with the caveat related to the high degree of uncertainty they are characterised by.

Table 4.9 shows the number of people employed in the key sector of tourism, hospitality, leisure, and retail in County Kildare in 2022[33] and projected employment figures for 2030 under the three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios as well as past employment levels (2011, 2016, 2022) in County Kildare are displayed in Figure 4.26. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.27.

**Table 4.9: Scenarios for Projected Skills Demand in Tourism, Hospitality, Leisure & Retail**

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Growth Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| 15,160<br>12.2% | High Growth | 15,888<br>10.8% | + 4.8% |
| | Baseline | 15,382<br>10.5% | +1.5% |
| | Low Growth | 14,931<br>10.2% | -1.5% |

33 *Based on CSO Census 2022 data on Detailed Industrial Group*

**Figure 4.26: Tourism, Hospitality, Leisure & Retail – Past and Projected Employment Trends, 2011-2030**

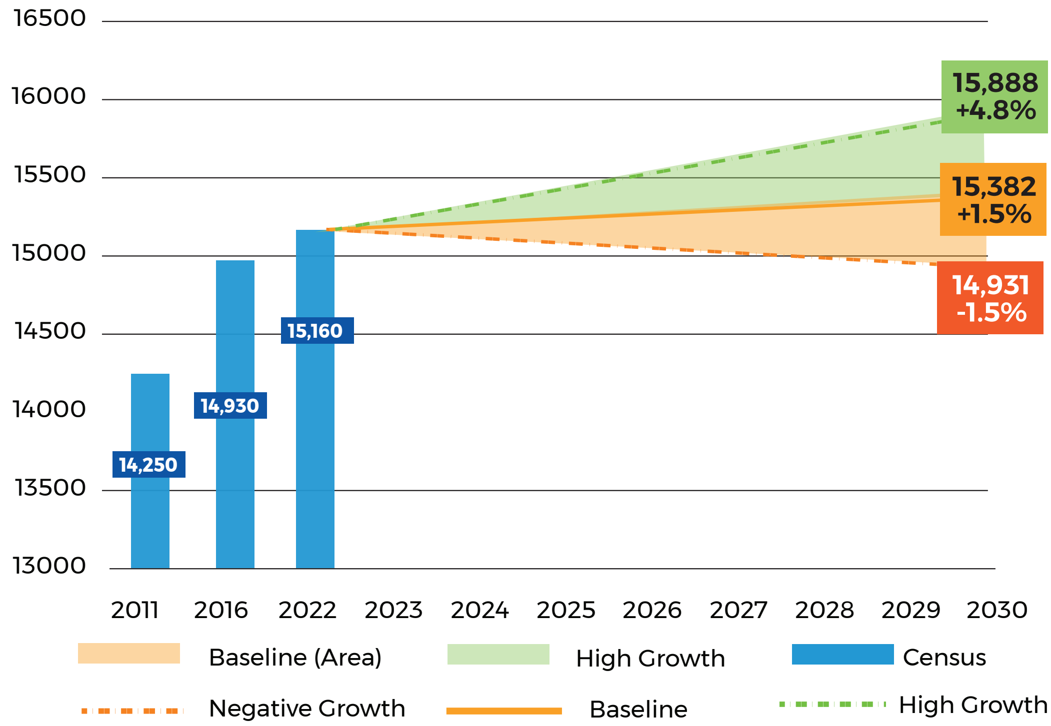
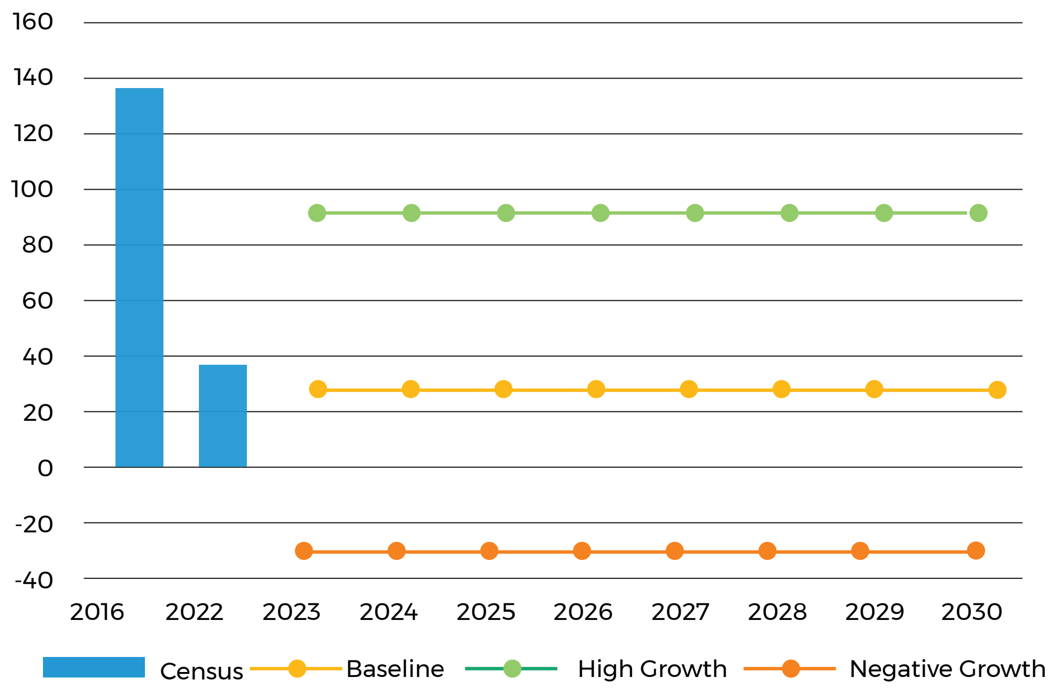



**Figure 4.27: Tourism, Hospitality, Leisure & Retail – Employment Projections Annual Change, 2016-2030**



### Baseline Scenario

Under the **baseline scenario**, the sector is expected to continue expanding. Underlying assumptions for this scenario include:

- A continued moderate growth of the sector overall due to increasing demand and a continued rebound effect from the Covid19-pandemic.
- Limited growth of County Kildare as a distinct tourist destination, leading to modest growth in visitor numbers and limited opportunities for destination managers and accommodation providers.

The projected growth of the labour force estimates an increase in the number of employees in Tourism, Hospitality, Leisure & Retail occupations by 1.5% (amounting to 222 persons) reaching 15,382 persons in 2030.[34] The yearly workforce change over the 2023-2030 period is shown in Table 4.10.

As the total County Kildare labour force is expected to expand at a higher rate over the projection period, the proportion of professionals in tourism, hospitality, leisure & retail employment is expected to decrease slightly from the 2022 level of 12.2% to 10.5% of the County labour force.

**Table 4.10: Baseline scenario – Yearly change in the number of Tourism, Hospitality, Leisure & Retail employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +28 | +28 | +28 | +28 | +28 | +28 | +28 | +28 | **+222** |

### High Growth Scenario

The **high growth scenario** projects that employment in Tourism, Hospitality, Leisure & Retail will increase by 4.8% (728 persons) and will amount to 10.8% of the County's labour force in 2030.[35] The yearly workforce change over the 2023-2030 period is shown in Table 4.11. Underlying assumptions for this scenario include:

- The continued growth of the sector overall due to strong demand and a continued rebound effect from the Covid19-pandemic.
- Consolidation of County Kildare as a multi-day visitor experience as a result of (1) further diversifying the County's offering, including the addition of new attractions and expanding various forms of tourist accommodations, and (2) enhanced and effective marketing approach.
- Further integration of the wide range of tourism, hospitality, leisure, and retail offerings into a mutually beneficial ecosystem that sets County Kildare apart from other regions nationally and internationally.
- Improvements in infrastructure around housing and transport ensure continued competitiveness of County Kildare compared to other locations.

34 *For the baseline scenario, the 2016-2022 intercensal growth rate is used.*
35 *For the High Growth scenario, the 2011-2016 intercensal growth rate is used.*

**Table 4.11: High Growth Scenario – Yearly change in the number of Tourism, Hospitality, Leisure & Retail employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +91 | +91 | +91 | +91 | +91 | +91 | +91 | +91 | **+728** |

### Low Growth Scenario

The **low growth** scenario assumes that the number of people employed in Tourism, Hospitality, Leisure & Retail will decrease by 1.5% (amounting to a decline of 229 employees), falling to 9.9% of the County's labour force by 2030.[36] The yearly workforce change over the 2023-2030 period is shown in Table 4.12. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn, or insecurity because of sectoral crises.
- A failure to further establish County Kildare as a tourist destination including in relation to tourist accommodation and attractions.
- A decreasing level of competitiveness of County Kildare compared to other locations due to a high cost of living and limited access to housing and transport.
- A lack of staff with the required qualifications and low engagement with upskilling opportunities.

**Table 4.12: Low Growth Scenario – Yearly change in the number of Tourism, Hospitality, Leisure & Retail employees**

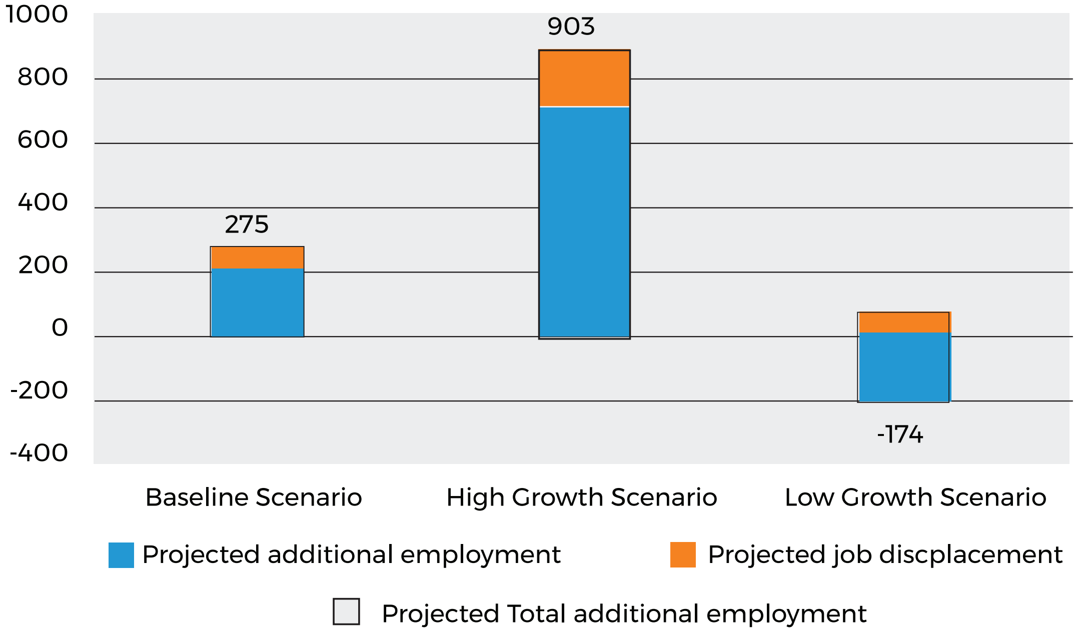
| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| -29 | -29 | -29 | -29 | -29 | -29 | -28 | -28 | **-229** |

### Projected Employment and Displacement

Figure 4.28 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees due to displacement, the baseline scenario would assume a total of 275 additional jobs to 2030, the high growth scenario would assume a total of 903 and the low growth scenario would assume a loss of a total of 174 jobs.

[36] *For the Low Growth scenario, the inverse of the 2016-2022 intercensal growth rate is used*

**Figure 4.28: Tourism, Hospitality, Leisure & Retail – Projected Employment and Displacement, 2023-2030**



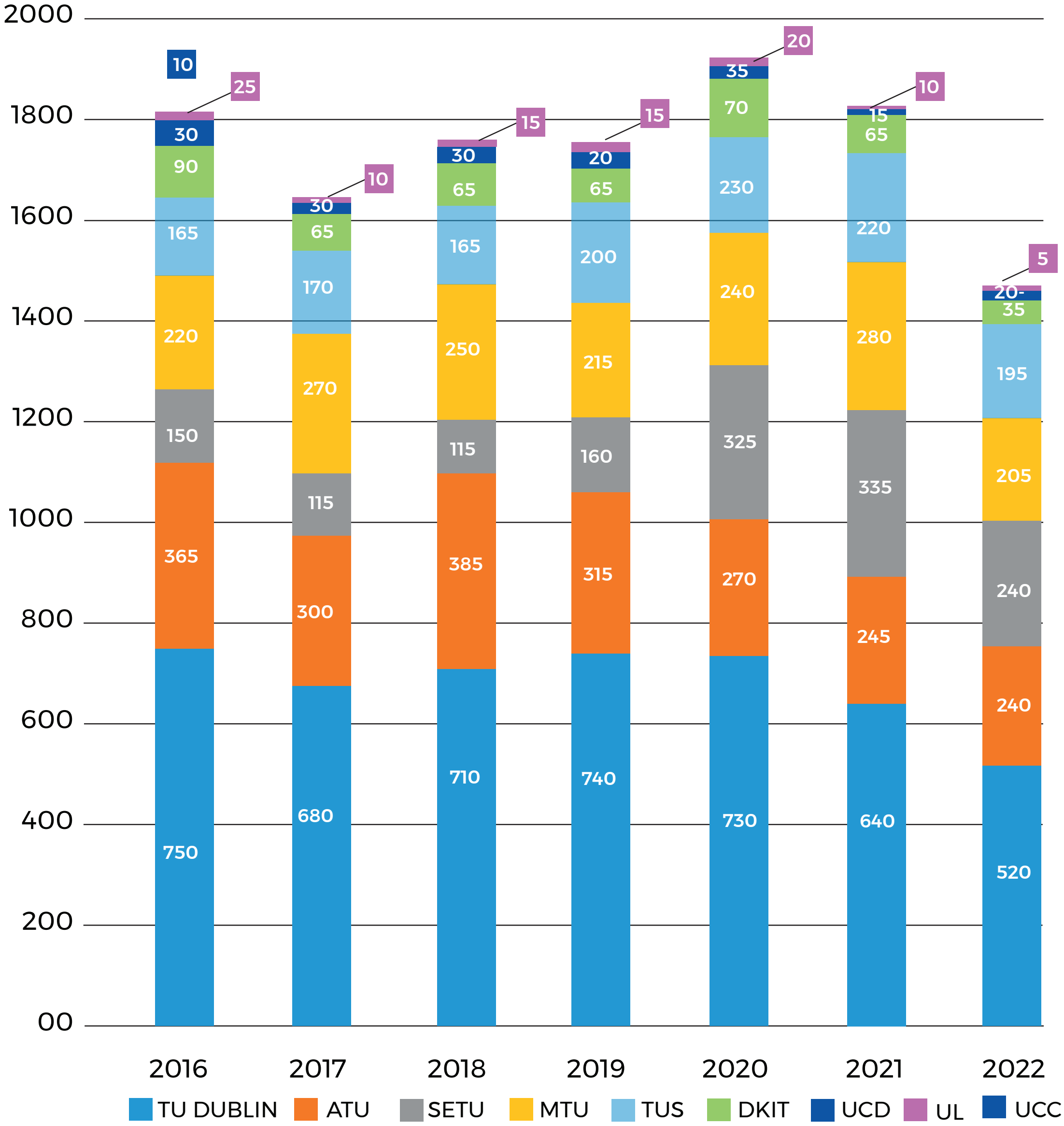

### 4.3.3 Skills Supply

From 2016 to 2022, the number of graduates in tourism, hospitality, leisure, and retail-related fields[37] has fluctuated between 1,460 and 1,920, with a generally downward trend (Figure 4.29). More than 90% of graduates came from TU Dublin, ATU, MTU, SETU, and TUS. While TU Dublin produced the highest number of graduates throughout the years with a decreasing trend, graduates from SETU have been increasing. From 2016 to 2022, the share of graduates from HEIs based in the wider catchment of County Kildare (Dublin, Dundalk, Maynooth, Carlow/Waterford) has remained stable at 53-60%.

Although employment in the tourism, hospitality, leisure, and retail sector and even the third-level educated cohort within this group does not exclusively rely on graduates from HEIs, the decline in the number of students reflected in Figure 4.29 may suggest future issues regarding the size of the available workforce in this field. This may be partly related to salary levels, career growth opportunities, and the flexibility around worktime in a number of professions in this sector.

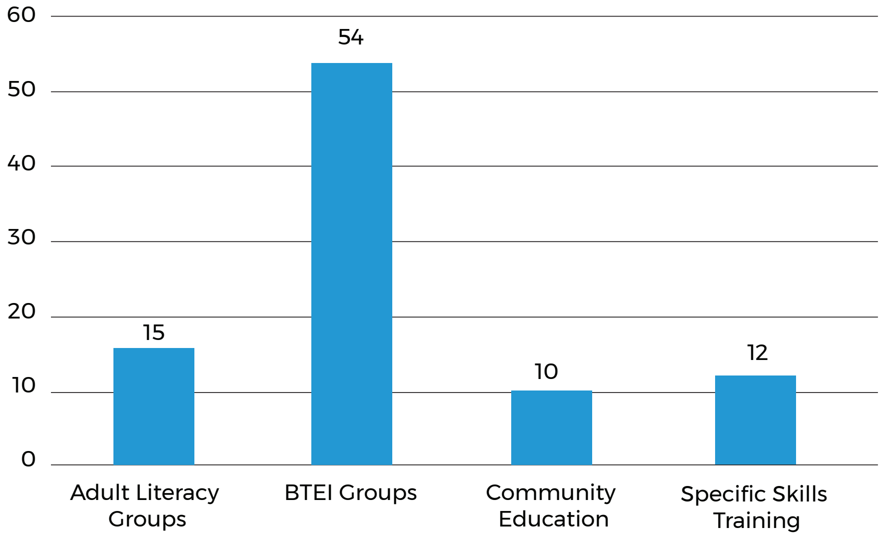
[37] *HEIs data related to programmes categorised under '(0416) Wholesale and retail sales', '(1012) Hair and beauty services', '(1013) Hotel, restaurant and catering' and '(1015) Travel, tourism and leisure' are considered relevant for these statistics.*

**Figure 4.29: HEIs Graduates – Tourism, Hospitality, Leisure & Retail**



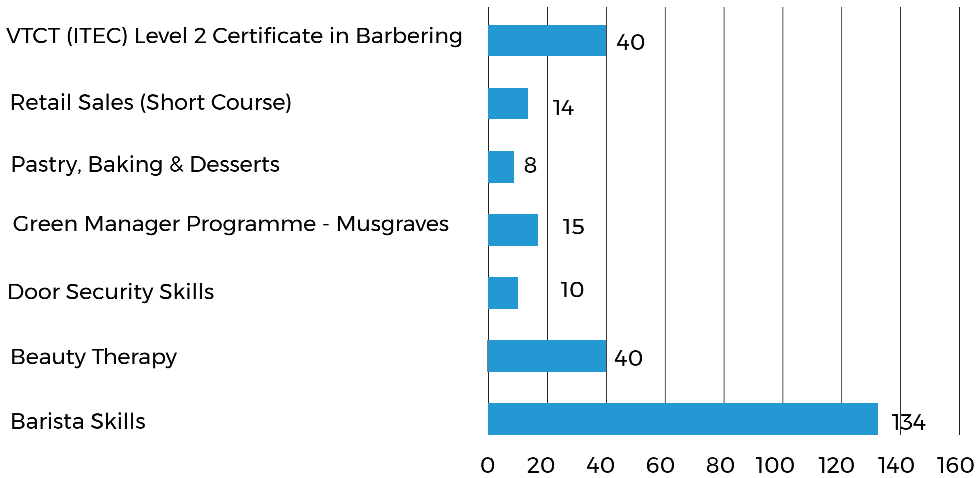

In addition to the courses offered in HEIs, numerous training courses and certificate programmes are offered through the KWETB. The three largest categories of programme focus can be divided into 'specific skills training' with a capacity of 132, 'FET Pathways from School' with a capacity of 60, and 'Post Leaving Cert Courses (PLC)' with a capacity of 40 (Figure 4.30). Courses offered within these categories range from a focus on barista skills, beauty therapy, barbering, to retail, and green skills. The majority of courses, 90% of total capacity, are offered in Naas and Newbridge, with the remaining courses offered in Kildare Town and Celbridge.

**Figure 4.30: Capacity of KWETB training courses relevant to Tourism, Hospitability, Leisure & Retail**




In relation to the provision of KWETB training courses, the programme capacity for the tourism, hospitality, leisure, and retail sector is the third largest amongst the key sectors with 261 total places. Compared to the number of persons working in the sector, the total course capacity is relatively small. Capacity differs for each programme with the highest capacity of courses relevant to this sector offered in barista skills, followed by beauty therapy and barbering. (Figure 4.31).

**Figure 4.31: Capacity of KWETB training courses relevant to Tourism, Hospitability, Leisure & Retail**



## Matching Skills Demand and Supply

The below figures outline projections relating to a need for a potential increase in skills training and supply based on the population growth scenarios found in Section 4.3.2. Figure 4.32 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the tourism, hospitality, leisure, and retail sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030.[38] Figure 4.33 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.[39]

**Figure 4.32: HEI Skills demand and National Graduates in Tourism, Hospitality, Leisure & Retail Sector**

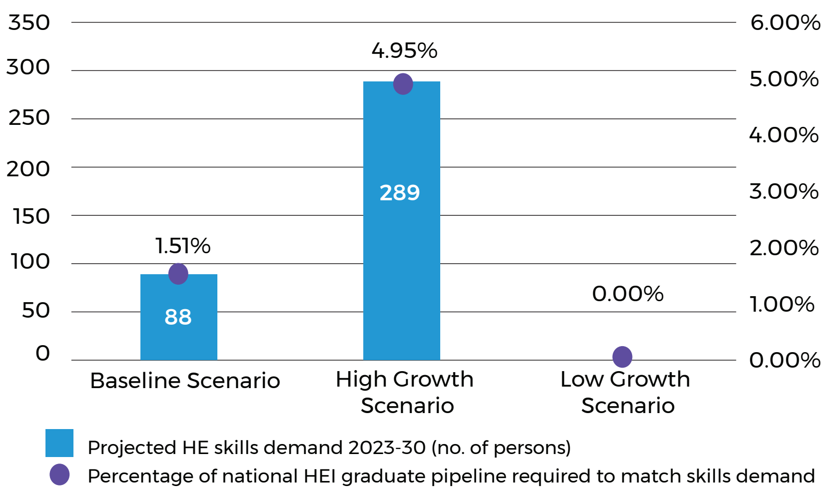
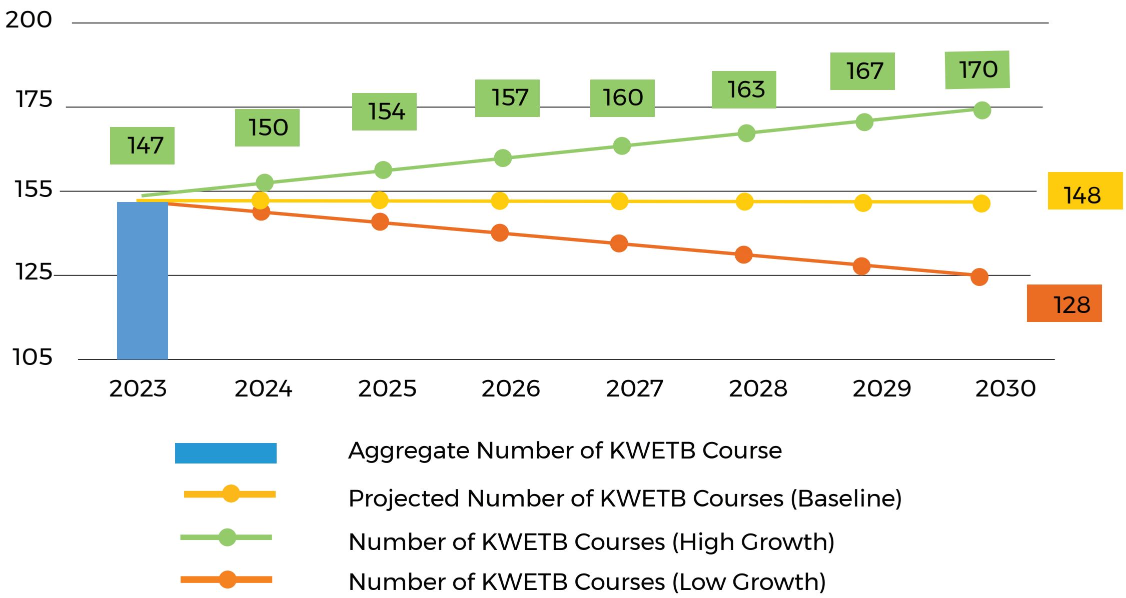



**Figure 4.33: Projected KWETB Courses Required in Tourism, Hospitality, Leisure & Retail Sector, 2024-2030**




38 *In the Low Growth Scenario, the calculated required number of HE graduates is negative, however this value has been corrected to zero for clarity.*

39 *The percentage of persons with third level degree working in tourism, hospitality, leisure, and retail is estimated at 32%. For the projection of the HE skills demand, it is assumed that 50% of HEI graduates in tourism, hospitality, leisure, and retail related courses will commence a profession in the sector.*

## 4.4 Key Sector Analysis 4: Logistics & Distribution

County Kildare's proximity to key transport corridors and infrastructure, including Dublin airport and port, along with its expanding transport infrastructure in terms of road and rail, mean that the County has an opportunity to build on its strength as a location of choice for logistics and distribution businesses. The sector is also interconnected with some of the other sectors outlined in this strategy including the food manufacturing and retail sectors which require robust supply chains to conduct their operations.

Looking at some of the trends in the logistics and distribution sector, technological advancements and a greater focus on sustainability are current trends that are likely to continue to drive transformation in the sector.[40] This includes the increasing use and importance of data analytics (big data), IoT (internet of things) devices and AI to enhance efficiency, productivity and assist in streamlining operations.[41] Similarly, sustainability is becoming ever more important in the sector, both in terms of regulations and consumer preferences. This includes efforts to record emissions to assist in monitoring progress towards sustainability targets[42] as well as the use of alternative fuels and electric vehicles to help reduce carbon emissions.[43]

As these trends in the sector continue and potentially intensify, the need and demand for associated skills to support the transformation will likely increase. This will include skills related to data analytics but with an understanding of how it relates to logistics, distribution and supply chains, as well as expertise in the implementation and use of AI and the Internet of Things in the sector. Similarly, demand for skills and expertise in sustainability and sustainable supply chain management is likely to increase. Furthermore, globally, staff shortages and turnover have been cited as ongoing challenges by employers in the sector.[44] Therefore, to continue to build on the opportunities that exist in County Kildare, the sector will need a strong pipeline of talent with relevant skills and engagement with education and training providers to ensure that provision meets private sector needs. An overview of the workforce profile in the County, along with associated projections is outlined below.

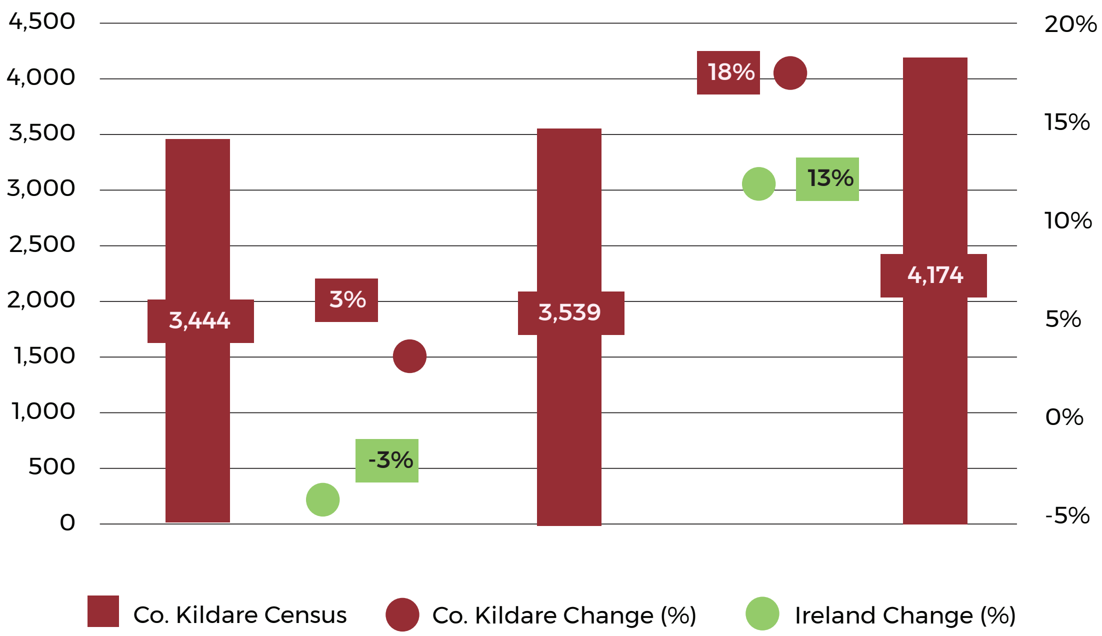
40 *KPMG. Supply chain trends 2024: The digital shake up. (kpmg.com, KPMG, 2024). Supply chain trends 2024: The digital shake-up - KPMG Global*
41 *DHL. Logistics Industry Trends for 2024. (dhl.com, DHL, 2023). Logistics Industry Trends for 2024 (dhl.com)*
42 *KPMG. Supply chain trends 2024: The digital shake up. (kpmg.com, KPMG, 2024). Supply chain trends 2024: The digital shake-up - KPMG Global*
43 *DHL. Logistics Industry Trends for 2024. (dhl.com, DHL, 2023). Logistics Industry Trends for 2024 (dhl.com)*
44 *World Economic Forum. Are these five trends disrupting or driving logistics growth?. (weforum.org) World Economic Forum, 2024). Are these 5 trends disrupting or driving logistics growth? | World Economic Forum (weforum.org)*

### 4.4.1 Sectoral Landscape in County Kildare

#### Workforce Profile

As detailed in Section 3.2, logistics and transport is the fifth largest key sector in County Kildare in terms of employment. As of 2022, 3.4%, or 4,174 persons in County Kildare operated in the logistics and distribution sector. The sector includes a wide range of activities. Growth of this sector in Kildare has outpaced that of Ireland, with growth of 21% from 2011-2022 compared to 9% of the State. The above figures suggests that County Kildare is benefiting from its central location in Ireland, the presence of above-average connectivity, and its proximity to Dublin, Dublin Airport, and Dublin Port. More specifically, County Kildare has attracted a large number of distribution and logistics centres from national and international food and fashion retailers, particularly in the Newbridge-Naas area along the R445.

**Figure 4.34: Employment, 2011-2022**

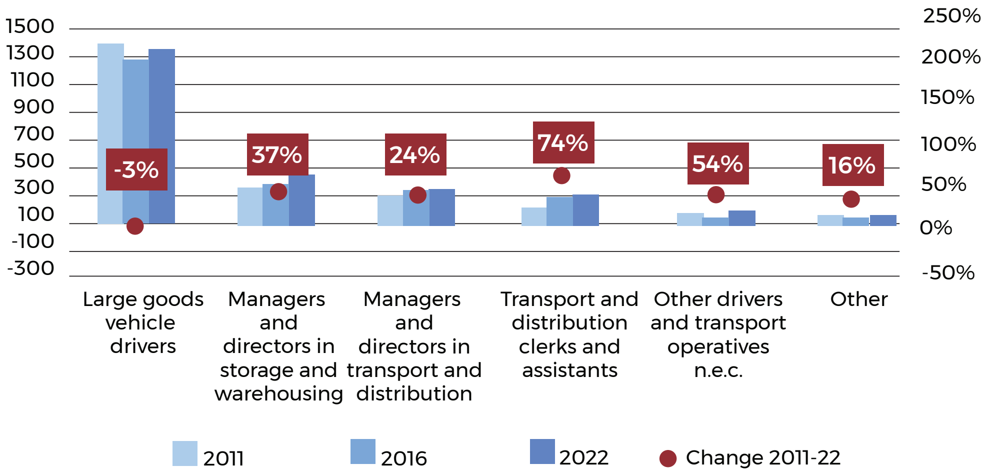



Total employment in the sector can be further broken down into 11 occupations, the largest five of which are included in Figure 4.35.[45] More than 70% of all jobs could be associated with the two activities 'elementary storage occupations' and 'large goods vehicle drivers'.

Activities with the highest growth in employment from 2011 to 2022 were 'elementary storage occupations' (+431 persons / +36%), 'Transport and distribution clerks and assistants' (+115 persons / +74%) and 'Managers and directors in storage and warehousing' (+110 persons / +37%). While no sector underwent a significant decline, the number of 'large goods vehicle drivers' remained nearly constant over the period (-44 persons / -3%). Growth in this sector can be observed for activities including managerial/supervisory roles, and non-managerial/supervisory roles equally.

[45] *These figures include Co. Kildare residents employed in the 11 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare.*

### Figure 4.35: Logistics & Distribution Employment by Occupations, 2011-2022




## 4.4.2 Projected Skills Demand

Potential 2030 employment figures in the logistics and distribution sector consider labour force trends, characteristics of the workforce, and sectoral trends (both national and local). Three scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape, the volatility in recent employment trends, and the methodological difficulty to project forward from low numbers, the scenarios presented below should be interpreted with the caveat related to the high degree of uncertainty they are characterised by.

Table 4.13 shows the number of people employed in the County Kildare logistics and distribution sector in 2022[46] and projected employment figures for 2030 under the three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios as well as past employment levels (2011, 2016, 2022) in County Kildare are displayed in Figure 4.36. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.37.

### Table 4.13: Scenarios for Projected Skills Demand in Logistics & Distribution

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| | High Growth | 5,668<br>3.9% | + 35.8% |
| 4,174<br>3.4% | Baseline | 4,921<br>3.4% | +17.9% |
| | Low Growth | 4.289<br>2.9% | +2.8% |

*[46] Based on CSO Census 2022 data on Detailed Industrial Groups.*

**Figure 4.36: Logistics & Distribution - Employment Projections Annual Change, 2016-2030**

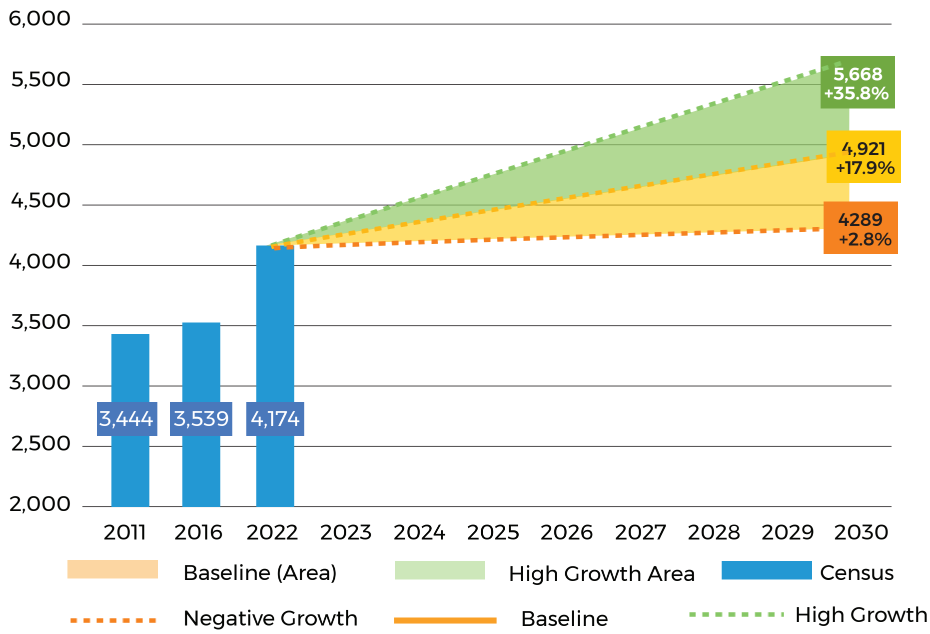
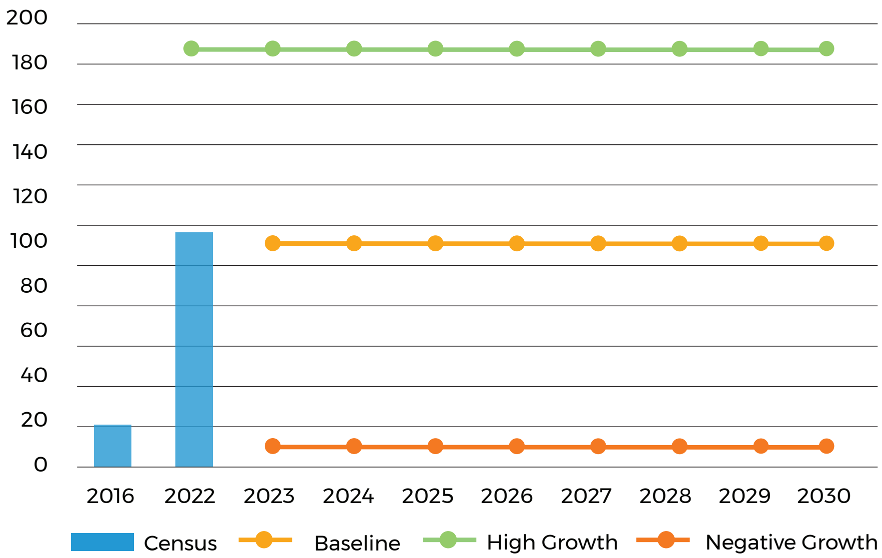



**Figure 4.37: Logistics & Distribution Employment Projections Annual Change, 2016-2030**




### Baseline Scenario

Under the **baseline scenario**, the sector is expected to continue expanding. Underlying assumptions for this scenario include:

- Continued growth of the sector overall due to the trends towards online retailing and centralised structures of businesses which increases demand for distribution centres.
- Continued growth of County Kildare as part of the greater Dublin urban area, attracting businesses and firms using Kildare as a hub for operations.
- Further expansion of the sector due to favourable business environment for small-and-medium-sized enterprises.

The projected growth of the labour force estimates an increase in the number of employees in logistics and distribution occupations by 17.9% (amounting to 747 persons) reaching 4,921 persons in 2030.[47] The yearly workforce change over the 2023-2030 period is shown in Table 4.14.

As the total County Kildare labour force is expected to expand over the projection period as well, the proportion of professionals in tourism, hospitality, leisure & retail employment is expected to remain at the 2022 level of 3.4% of the County labour force.

**Table 4.14: Baseline scenario – Yearly Change in the Number of Logistics & Distribution Employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +93 | +93 | +93 | +93 | +93 | +93 | +93 | +93 | **+747** |

### High Growth Scenario

The **high growth scenario** assumes that employment in logistics and distribution will increase significantly by 35.8% (1,494 persons) and will reach 3.9% of the County's labour force by 2030.[48] The yearly workforce change over the 2023-2030 period is shown in Table 4.15. Underlying assumptions for this scenario include:

- Enhanced growth of the sector due to accelerated trends towards online retailing and centralised structures of businesses which increases demand for distribution centres.

- Enhanced growth of County Kildare as part of the greater Dublin urban area, with higher-levels of success in attracting businesses and firms using Kildare as a hub for operations.

- Improvements in infrastructure around housing (increased provision of affordable rental units and properties for sale) and transport (public transport, active modes, business-related/ freight transport) ensure a continued business-related competitive advantage for County Kildare and facilitates enhanced access for businesses to a wider labour force within and beyond the County.

[47] *The baseline scenario uses the 2016-2022 intercensal growth rate.*
[48] *The high growth scenario assumes double the 2016-22 intercensal growth rate.*

**Table 4.15: High Growth Scenario – Yearly Change in the Number of Logistics & Distribution Employees**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +187 | +187 | +187 | +187 | +187 | +187 | +187 | +187 | **+1,494** |

### Low Growth Scenario

The **low growth scenario** assumes that the number of people employed in logistics and distribution will increase more conservatively by 2.8% (amounting to a growth of 112 employees), falling to 2.9% of the County's labour force by 2030.[49] The yearly workforce change over the 2023-2030 period is shown in Table 4.16. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn, or insecurity because of a sectoral crisis which could lead to existing enterprises exiting the market and preventing new enterprises being established.
- Potential of an isolated major distribution centre closure due to business-specific reasons.
- Increased use of automation leading to worker layoffs.
- A decreasing level of competitiveness of County Kildare compared to other locations due to a high cost of living and limited access to housing and transport.

**Table 4.16: Low Growth Scenario – Yearly Change in the Number of Logistics & Distribution Employees**

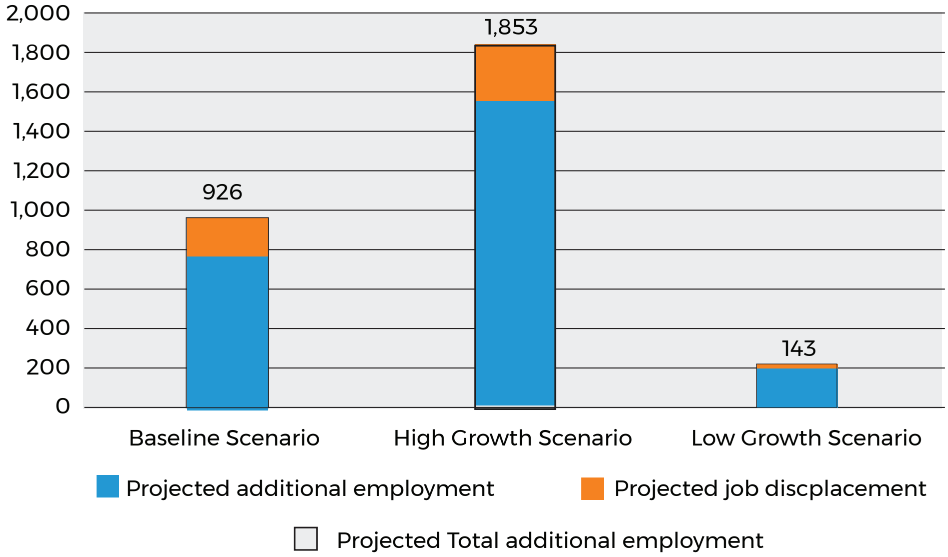
| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +14 | +14 | +14 | +14 | +14 | +14 | +14 | +14 | **+112** |

### Projected Employment and Displacement

Figure 4.38 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees, the baseline scenario would assume 926 additional jobs to 2030, the high growth scenario would assume 1,853 and the low growth scenario would assume a loss of 143 jobs.

[49] *The low growth scenario uses the 2011-16 intercensal growth rate.*

**Figure 4.38: Logistics & Distribution – Projected Employment and Displacement, 2023-2030**



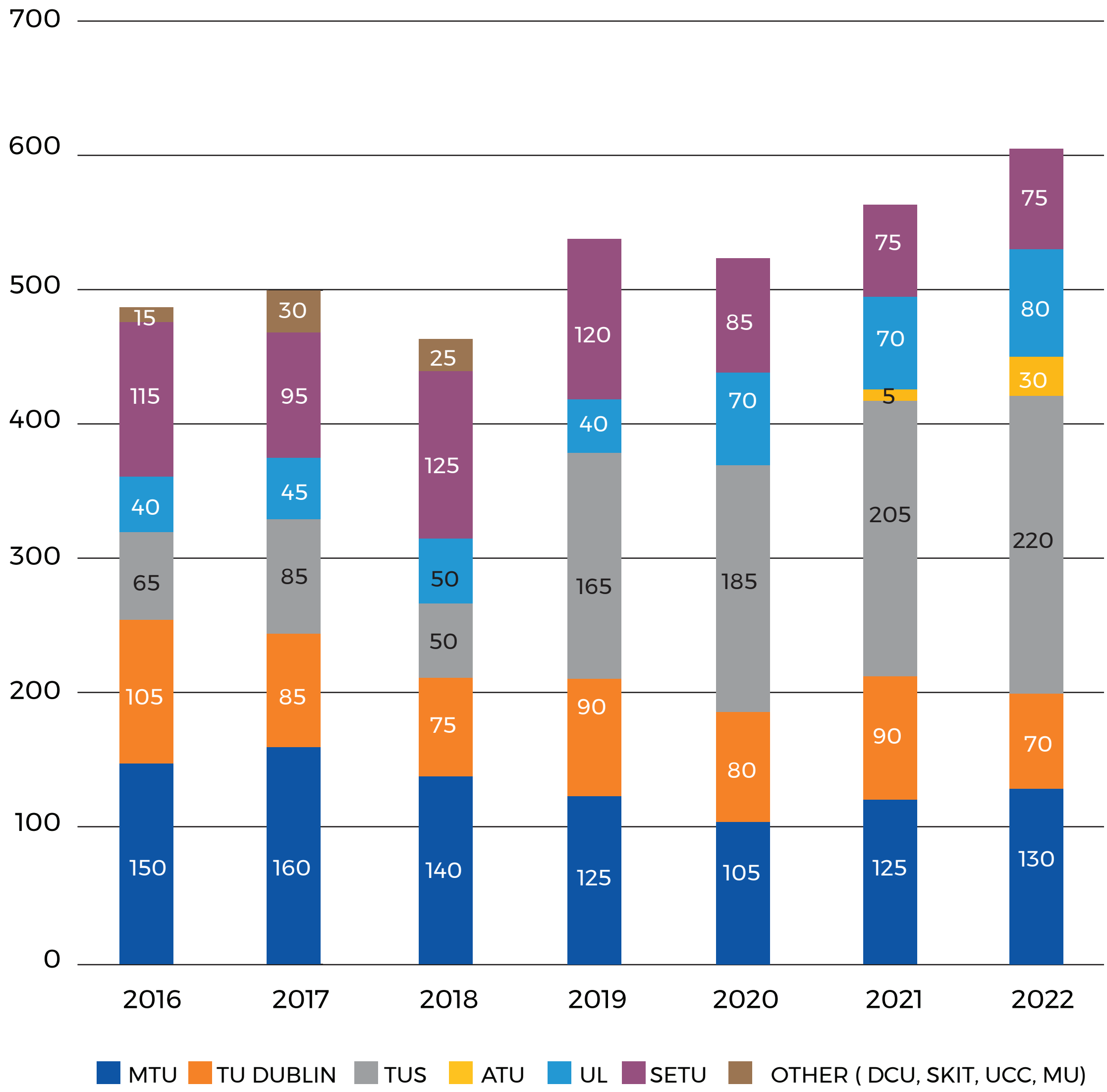

### 4.4.3 Skills Supply

From 2016 to 2022, the number of graduates in logistics and distribution-related fields[50] has fluctuated between 490 and 605, with a generally upward trend (Figure 4.39). Over one-quarter (26%) of graduates came from Technological University Shannon (TUS) and one-quarter of graduates came from Munster Technological University (MTU), nearly one-fifth (19%) came from South East Technological University (SETU) and another 27% came from Technical University Dublin (TU Dublin) and University of Limerick (UL).

TUS produced the most graduates over this period, growing its output from 65 to 220, or +238%. While MTU accounted for 25% of the period total, its total output decreased 13%. Similarly, TU Dublin also decreased in its output of sector graduates, falling 33% from 2016-2022. SETU also decreased in its graduate output by 35%.

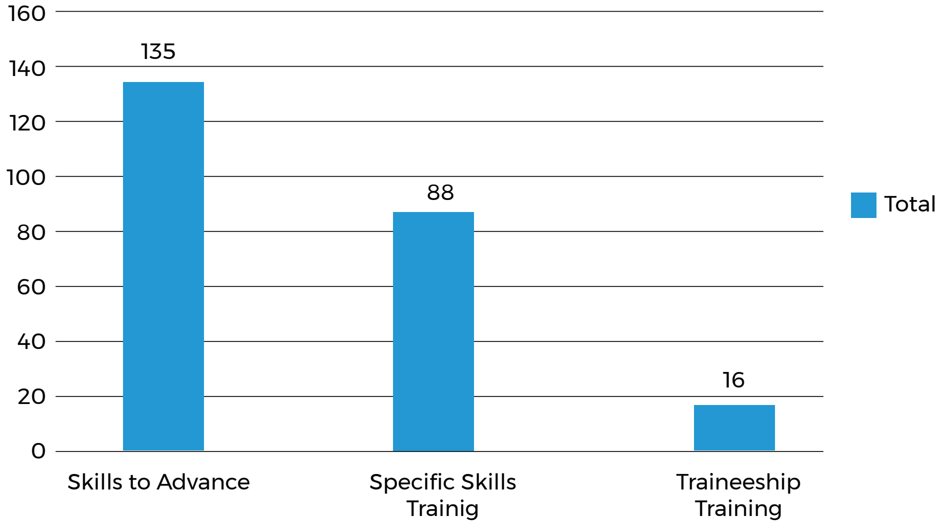
50 *HEIs data related to programmes categorised under '(0716) Motor vehicles, ships and aircraft', (1041) Transport services' are considered relevant for these statistics.*

**Figure 4.39: Graduates from HEIs in 2016-2022 in programmes related to Logistics & Distribution**



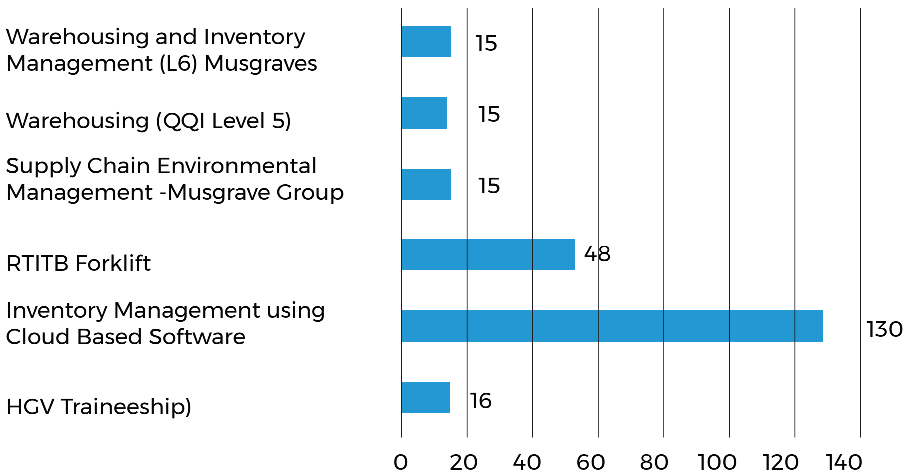

In addition to the courses offered in HEIs, numerous training courses and certificate programmes are offered through the KWETB. Categories of programme focus (Figure 4.40) can be divided into 'skills to advance' with a capacity of 135, 'specific skills training' with a capacity of 88, and 'traineeship training' with a capacity of 16. Courses offered within these categories include inventory management, forklift and warehousing training, and HGV traineeships. The majority of courses, 61% of total capacity, are offered online with the remainder being offered in person in towns such as Kilcock, Naas and elsewhere in County Kildare.

**Figure 4.40: Categories of KWETB training courses relevant to Logistics & Distribution**




The programme capacity for the logistics and distribution sector is relatively high compared to the number of persons working in the sector. Capacity differs for each programme with the highest capacity in 'inventory management using cloud-based software', and 'RTITB Forklift' (Figure 4.41).

**Figure 4.41: Capacity of KWETB training courses relevant to Logistics & Distribution**




### Matching Skills Demand and Supply in the Key Sector

The below figures comprise projections relating to a potential need for an increase in skills training and supply based on the growth scenarios found in Section 4.4.2. Figure 4.42 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the logistics and distribution sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030. Figure 4.42 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.[51]

[51] *The percentage of persons with third level degree working in logistics & distribution is estimated at 32%. For the projection of the HE skills demand, it is assumed that 75% of HEI graduates in tech and ICT related courses will commence a profession in the sector (basline, low growth scenarios), for the high growth scenario the figure is 100%*

**Figure 4.42: HEI Skills Demand and National Graduates Required in Logistics & Distribution Sector**

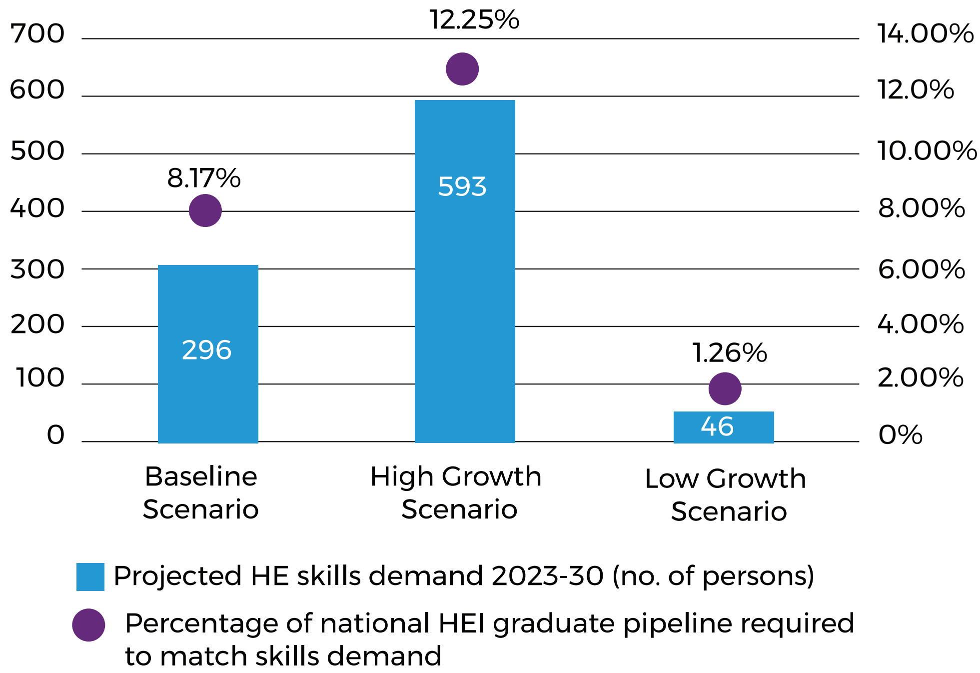
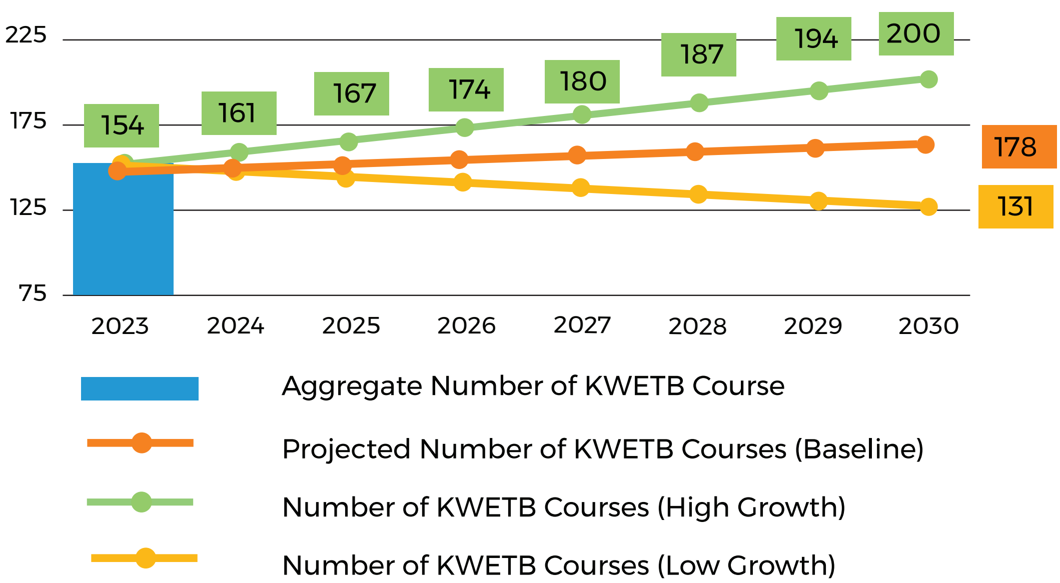



**Figure 4.43: Projected KWETB Courses Required in Logistics & Distribution Sector, 2024-2030**



## 4.5 Key Sector Analysis 5: Equine & Sports

The Equine sector has a long history in Kildare, with the County home to the Irish National Stud, Curragh Racecourse and the National Equine Innovation Centre, as well as many equine related businesses. It is an important sector for the County contributing both directly and indirectly to the economy including through the attraction of visitors to the County. Furthermore, it is estimated that the equine sector is worth $2.46 billion to the Irish economy and supports over 30,000 jobs in Ireland.[52] With Kildare perceived as the heart of the horse racing and equine sector in Ireland, its importance and contribution to the County is likely to continue. However, staff shortages and workers leaving the country to pursue better opportunities have been highlighted as a key issue in the overall sector.[53]

Key developments in the sector are focused on enhanced marketing and education, improving animal welfare standards, technology use and sustainability. For instance, continuous improvement of animal welfare standards and evidence and communication of these improvements to the wider community are seen to be vital to the sector's social licence to operate. [54] This also ties in with the marketing and education of the equine sector which aims to educate the community about the sector and raise awareness of the career opportunities that are available. [55] The use of technology in the sector is also increasing across all areas including animal welfare, racing and breeding.[56] Furthermore, sustainability is becoming ever more important with the need to adopt sustainable practices in the face of wider community concern around climate change and the biodiversity crisis.[57] An overview of the sector in County Kildare, along with associated projections is outlined below.

52 *Horse Racing Ireland. Horse Racing Ireland: Strategic Plan 2024-2028. (hri.ie, Horse Racing Ireland, 2024.)* *https://www.hri.ie/HRI/media/HRI/Company%20Policies/Strategic%20Plan/Horse-Racing-Ireland-Strategic-Plan-2024.pdf*

53 *Teagasc. Untapped Potential: Unlocking the Economic Potential of the Irish Sport Horse Industry. (teagasc.ie, Teagasc, 2018).* *UNTAPPED POTENTIAL – UNLOCKING THE ECONOMIC POTENTIAL OF THE IRISH SPORT HORSE INDUSTRY (teagasc.ie)*

54 *Equine Ethics & Wellbeing Commission. A Good Life for Horses: A vision for the future involvement of horses in sport. Final Report. (inside.fei.org, FEI, 2023). EEWBC Final Report to FEI Board_Updated 14Nov23.pdf*

55 *Horse Racing Ireland & Deloitte. Social and economic impact of Irish thoroughbred Breeding & Racing 2023. (hri.ie, Horse Racing Ireland & Deloitte, 2023). HRI-2023-Deloitte-Social-and-Economic-Impact-Report-FINAL.pdf*

56 *Horse Racing Ireland & Deloitte. Social and economic impact of Irish thoroughbred Breeding & Racing 2023. (hri.ie, Horse Racing Ireland & Deloitte, 2023). HRI-2023-Deloitte-Social-and-Economic-Impact-Report-FINAL.pdf*

57 *Horse Sport Ireland. Environmental Sustainability: Equestrianism, Equine Breeding and Equine Sport. (horsesportireland.ie, Horse Sport Ireland, 2023). HSI Insights Report (horsesportireland.ie)*

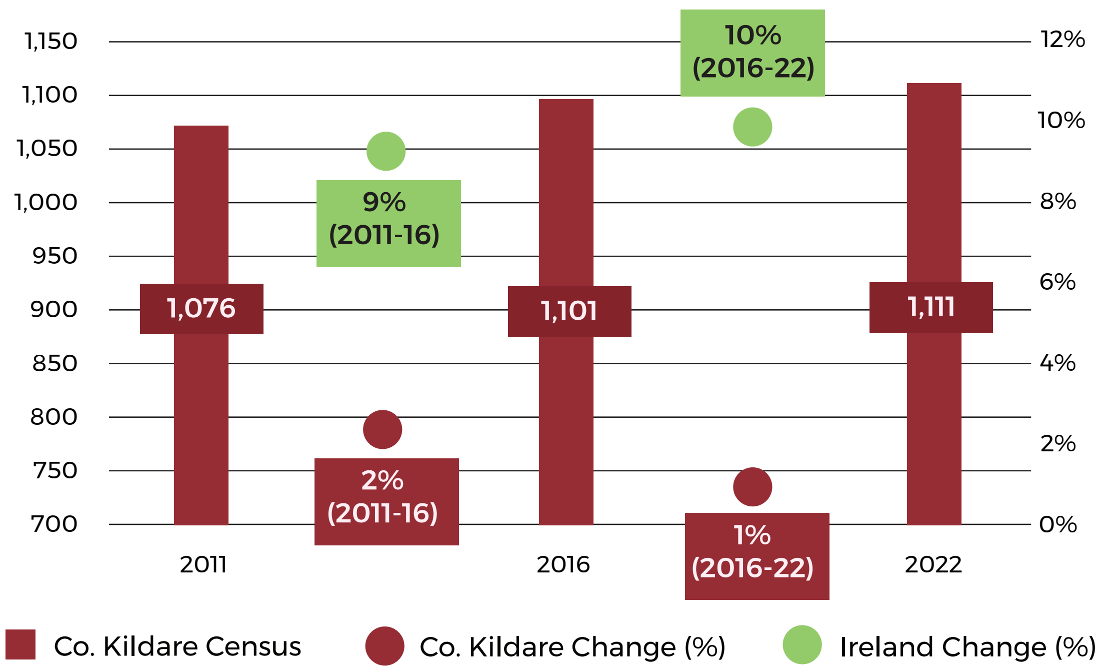
## 4.5.1 Sectoral Landscape in County Kildare

### Workforce Profile

As detailed in Section 3.2, sports and equine is the smallest of the six business sectors examined in County Kildare. While both sport and equine subsectors have a presence throughout the whole of the County, the equine sector is largely concentrated in the centre and north of the County in the wider vicinity of Naas, Kildare Town, Newbridge, Kill and Maynooth (Naas, Kildare-Newbridge and Clane-Maynooth MDs). As of 2022, less than one percent (0.9%) of all occupations in County Kildare operated in the sports and equine sector (1,111 in total).[58] The sector largely includes occupations in the equine subsector, where a measured decrease in jobs between 2011-2022 is noted (Figure 4.45). Occupations within the sector consist of elementary occupations and skilled workers in horse-racing and managers or proprietors in horse-racing, as well as veterinarians and veterinary nurses. Non-primary equine occupations in this sector include other sports players, coaches, instructors, and officials.

The largest decline from 2011-2022 in this sector were those of elementary and skilled workers in horse-racing and related industries. Horse-racing and related occupations that grew over the same period were the manager and proprietor classification of horse-racing and related activities, veterinarians, and veterinary nurses (Figure 4.45).

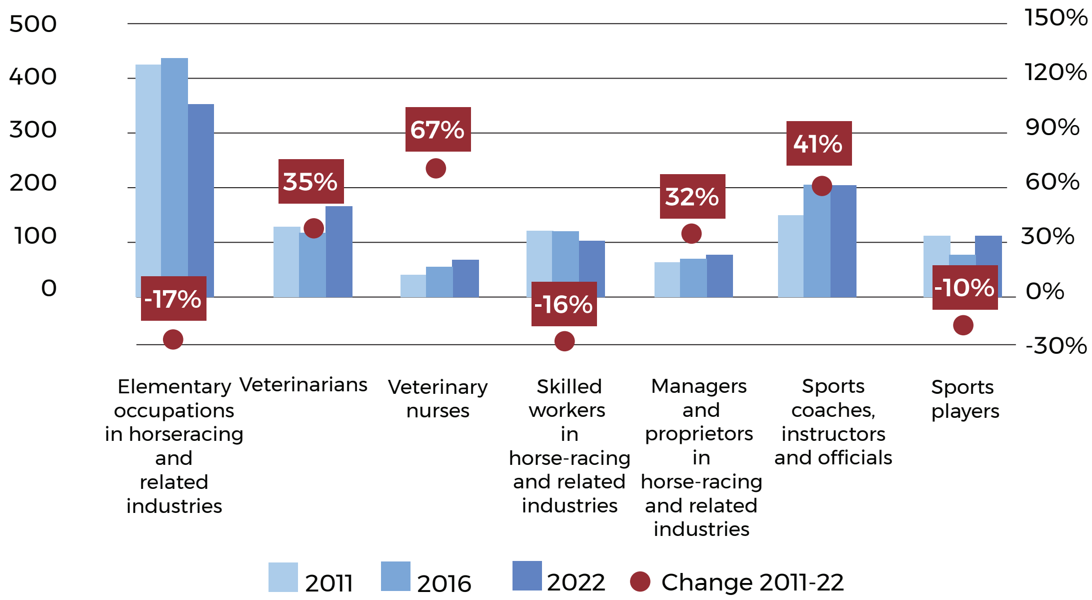
**Figure 4.44: Equine & Sports Employment, 2011-2022**




Elementary and skilled occupations with the equine subsector also decreased within the State between 2011-2022, although this was offset by growth of the manager and proprietor classification within the subsector and growth of other sporting occupations in the wider industry. Despite these job losses, the equine industry in Kildare (0.9%) still accounts for a larger proportion of the overall economy than the equine industry within Ireland (0.4%).

[58] *These figures include Co. Kildare residents employed in the 7 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare.*

**Figure 4.45: Equine & Sports Employment by Occupations, 2011-2022**




## 4.5.2 Projected Skills Demand

Projected 2030 employment figures in the sports and equine sector take into account labour force trends, characteristics of the sports and equine workforce, and sectoral trends (both national and local). Three diverging scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape, the volatility in recent employment trends, and the methodological difficulty to project forward from low numbers, the scenarios presented below should be interpreted with the caveat related to the high degree of uncertainty they are characterised by.

Table 4.17 shows the number of Kildare employees in the sports and equine sector in 2022[59] and forecasted employment figures for 2030 under three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios, as well as past employment levels (2011, 2016, 2022), in sports and equine in County Kildare are displayed in Figure 4.46. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.47.

**Table 4.17: Scenarios for Projected Skills Demand in the Equine & Sports Sector**

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| | High Growth | 1,148<br>0.9% | + 3.3% |
| 1,111<br>0.9% | Baseline | 1,124<br>0.8% | +1.16% |
| | Low Growth | 1.085<br>0.7% | -2.3% |

*59 Based on CSO Census 2022 data on Occupations.*

**Figure 4.46: Equine & Sports – Past and Projected Employment Trends, 2011-2030**

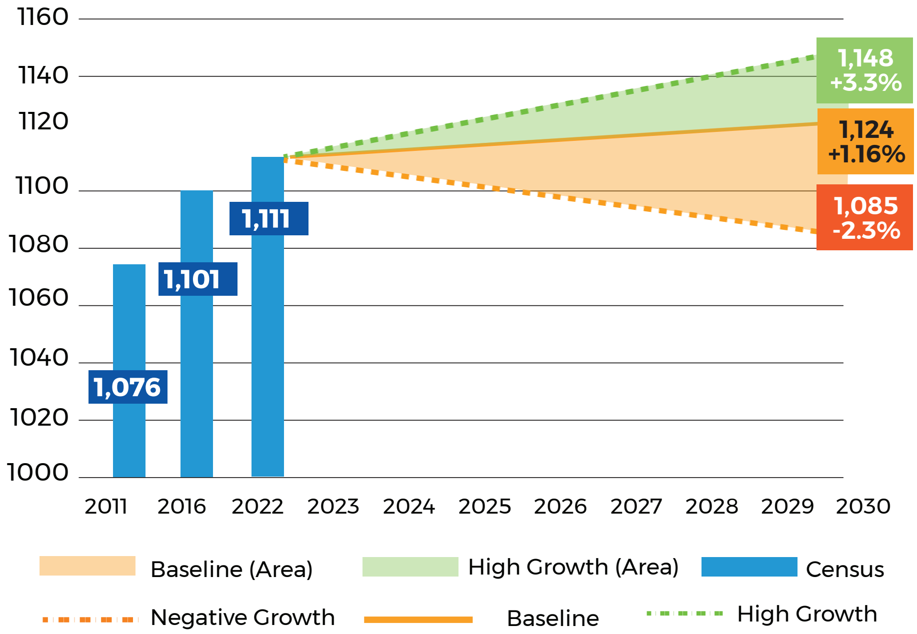
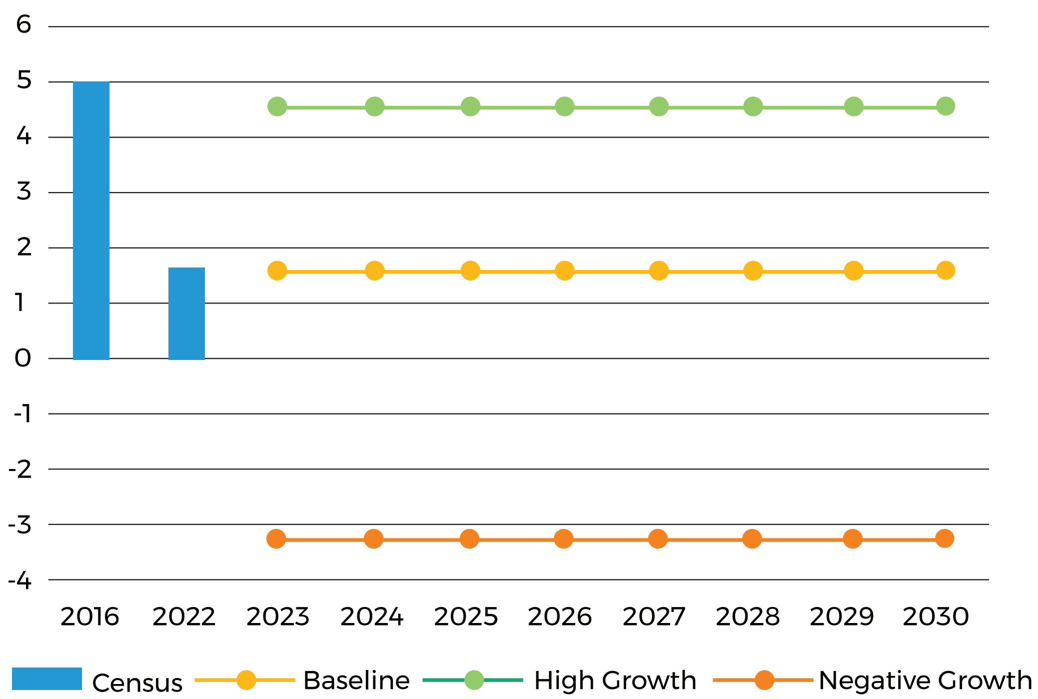



**Figure 4.47: Equine & Sports – Employment Projections Annual Change, 2016-2030**



## Baseline Scenario

Under the **baseline scenario,** the sector is expected to continue expanding. Underlying assumptions for this scenario include:

- Continued sector development due to a growth-oriented government policy.
- Demonstrated resilience of equine industry as evidenced by successful growth during COVID-19 pandemic.
- Sustained draw of the Kildare equine and sporting sector as a tourist attraction and foreign direct investment generator.

The projected growth of the labour force implies an increase in the number of employees in sports and equine occupations by 1.16% (amounting to 14 persons) reaching 1,124 persons in 2030.[60] This scenario mirrors the small but positive growth the sector has seen since 2011. The yearly workforce change (i.e., skills requirements) over the 2023-2030 period is shown in Table 4.18.

As the total County Kildare labour force is expected to expand at a higher rate over the projection period, the proportion of professionals in equine and sports employment is expected to decrease slightly from the 2022 level of 0.9% to 0.8% of the County labour force.

**Table 4.18: Baseline Scenario – Yearly Change in Equine & Sports Occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +2 | +2 | +2 | +2 | +2 | +2 | +2 | +2 | **+14** |

### High Growth Scenario

The **high growth scenario** assumes that employment in equine and sports will increase by 3.3% (40 persons) and will remain 0.9% of the labour force in 2030.[61] The yearly workforce change over the 2023-2030 period is shown in Table 4.19. Underlying assumptions for this scenario include:

- Accelerated growth of the sector due to growth-oriented government policy, such as realisation of the proposed Equine Tourism Destination Centre and other development objectives designed to promote continued growth of the equine subsector on national and international scales.
- Ongoing gravitational effect of the County as a destination for equine breeding, training and racing.
- Protection of the lands and environment to ensure continued growth of the equine subsector through breeding, training and racing in County Kildare.

**Table 4.19: High Growth Scenario – Yearly Change in Equine & Sports Occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +5 | +5 | +5 | +5 | +5 | +5 | +5 | +5 | **+40** |

60 *The baseline scenario assumes half of the 2011-2016 intercensal growth rate.*
61 *The high growth scenario uses the 2011-2022 growth rate.*

## Low Growth Scenario

The **low growth scenario** assumes that the number of people employed in equine and sports will decrease by 2.4% (amounting to a decline by 27 persons), falling to 0.7% of the County's labour force by 2030.[62] The yearly workforce change over the 2023-2030 period is shown in Table 4.20. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn or insecurity resulting in decreased horse breeding and training.
- Decrease in international investment or downturn in tourism in the equine or sporting sector.
- Continued urbanisation of County Kildare and encroachment of urban sprawl from metropolitan Dublin, putting stress on the environment needed for equine sector functionality and growth.
- Difficulty in securing or retaining employees and recruiting new hires in the sector.
- Increase in insurance, operating and regulatory costs for proprietors.

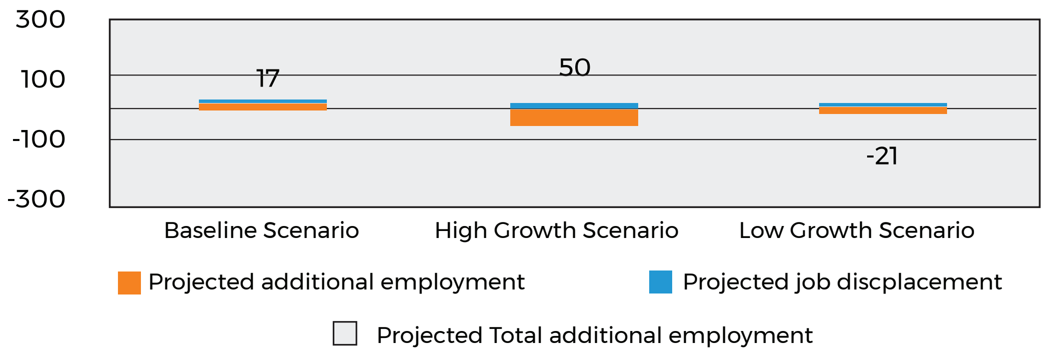
**Table 4.20: Low Growth Scenario – Yearly Change in Equine & Sports Occupations Projected Employment and Displacement**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| -3 | -3 | -3 | -3 | -3 | -3 | -3 | -3 | **-27** |

## Projected Employment and Displacement

Figure 4.48 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees, the baseline scenario would assume 17 additional jobs to 2030, the high growth scenario would assume 50 and the low growth scenario would assume a loss of 21 jobs.

**Figure 4.48: Equine & Sports – Projected Employment and Displacement, 2023-2030**




62 *For the low growth scenario, the inverse of the 2011-2016 intercensal growth rate is used.*

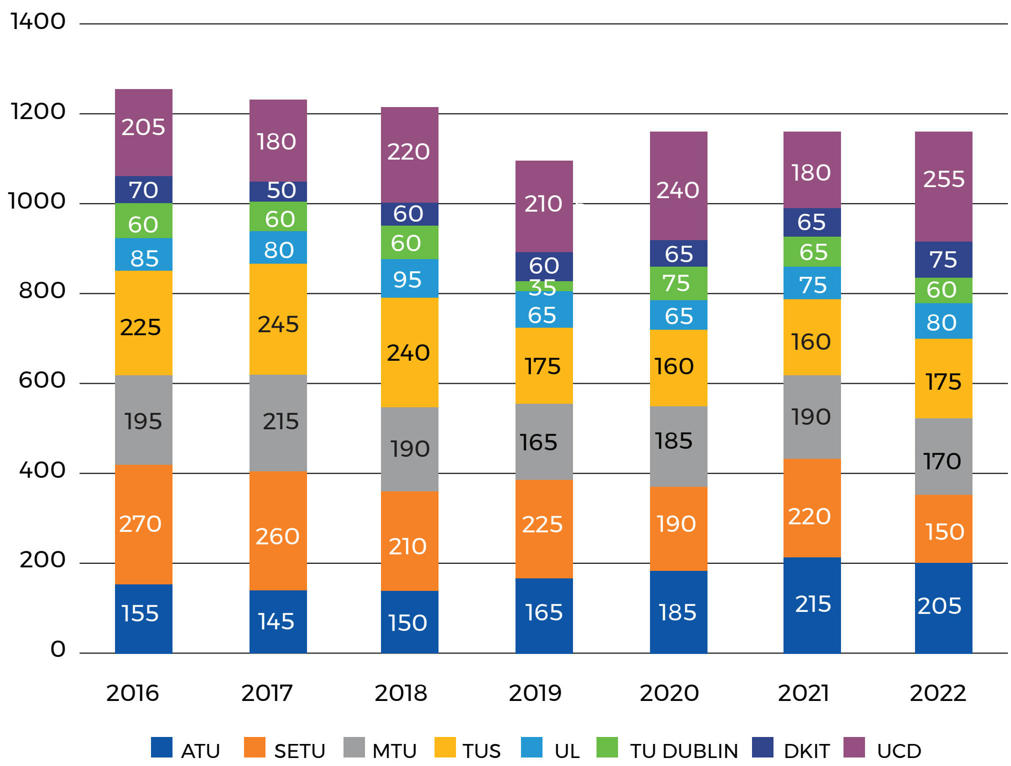
### 4.5.3 Skills Supply

From 2016 to 2022, the number of graduates in sports and equine-related fields[63] has fluctuated between 1,100 and 1,265, with a general downward trend (Figure 4.49). Nearly one-fifth (18%) of graduates came from the South-East Technological University (SETU) and University College Dublin (UCD), respectively, while 17% came from Technological University Shannon (TUS). A further 16% came from Munster Technological University (MTU) and another 15% from Atlantic Technological University (ATU).

SETU and UCD alone accounted for 36% of all sector graduates during this period. While SETU produced the most graduates over this period at 1,525, the total output of SETU graduates in this sector decreased by 44% over the period.

Similarly, TUS and MTU also decreased in the output of sector graduates, falling 22% and 13% respectively from 2016-2022. Conversely, the number of graduates from UCD increased by 24% and ATU graduates increased by 32% over the period.

**Figure 4.49: Graduates from HEIs in 2016-2022 in programmes related to Equine & Sports**




In addition to the courses offered in HEIs, numerous training courses and certificate programmes relevant to the sports and equine sector are offered through the KWETB. The total number of offered course places is substantial given the number of employees in the sector. Categories of programme focus (Figure 4.50) can be divided into 'post-leaving certificate (PLC) with a capacity of 92 and 'specific skills training' with a capacity of 40. Courses offered within these categories include 'sports, recreation and exercise' courses, 'equine studies', 'the jockey preparation course, and 'introduction to the thoroughbred industry and equine breeding' (Figure 4.51). The course locations are split between the Curragh the Newbridge, offering 40 and 92 course places, respectively.

[63] *HEIs data related to programmes categorised under '(1014) Sports' and (0841) Veterinary' are considered relevant for these statistics. 1*

**Figure 4:50: Category of KWETB training courses relevant to Equine & Sports**

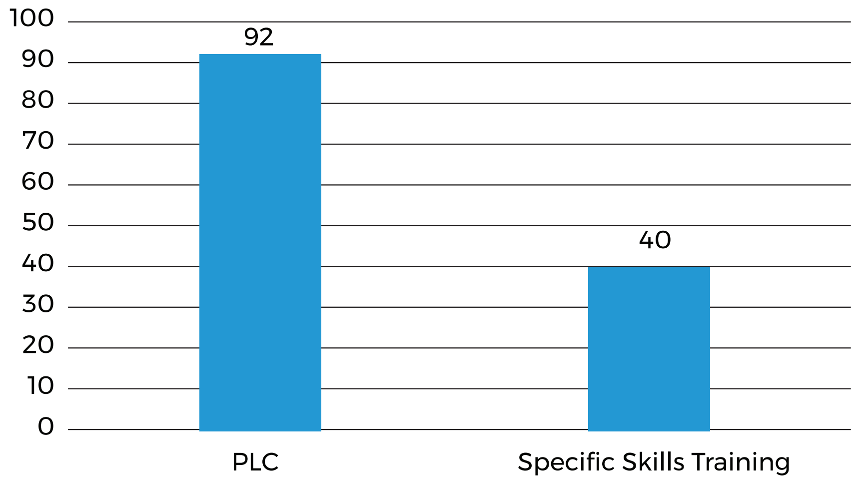
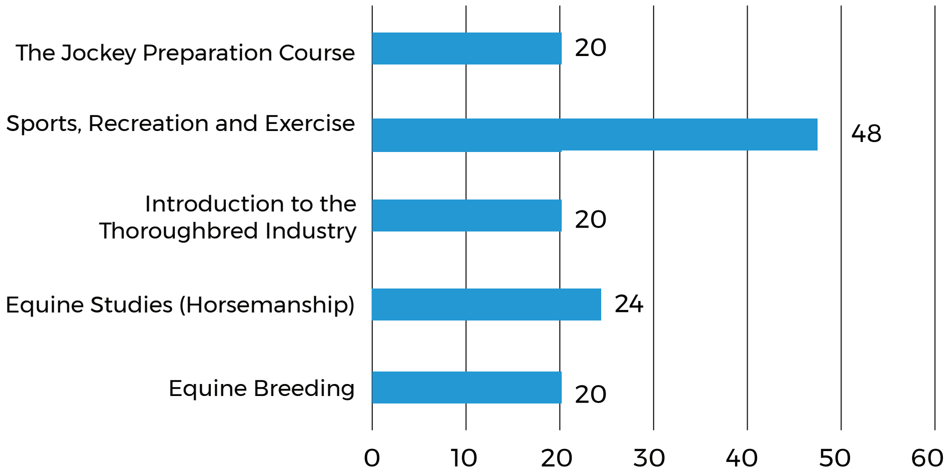



**Figure 4.51: Capacity of KWETB training courses relevant to Equine & Sports**



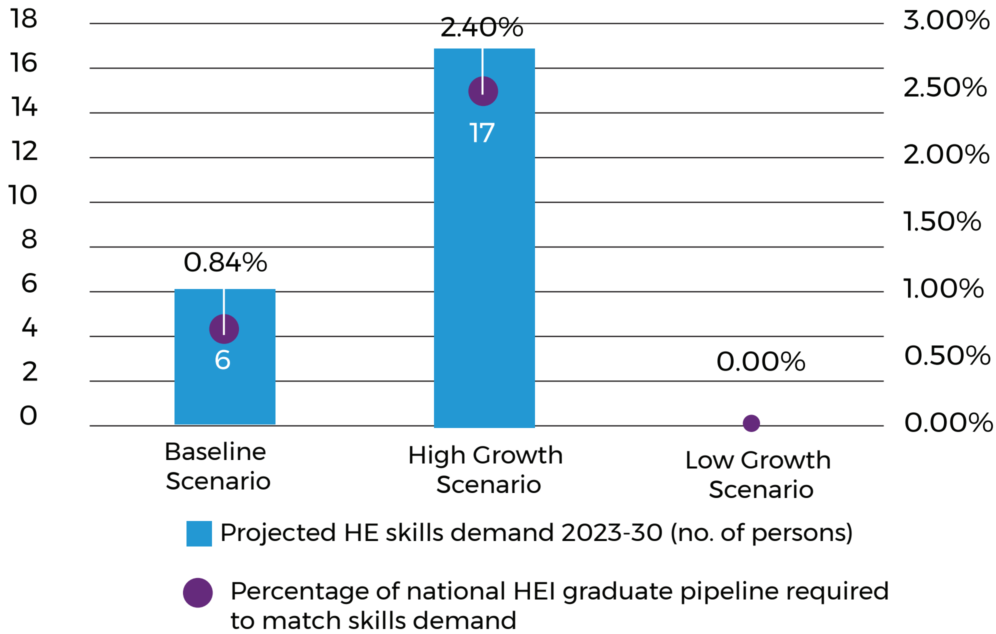

### Matching Skills Demand and Supply in the Key Sector

The below figures outlines projections relating to a potential need for an increase in skills training and supply based on the population growth scenarios found in Section 4.4.2. Figure 4.52 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the logistics and distribution sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030.[64] Figure 4.53 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.[65]

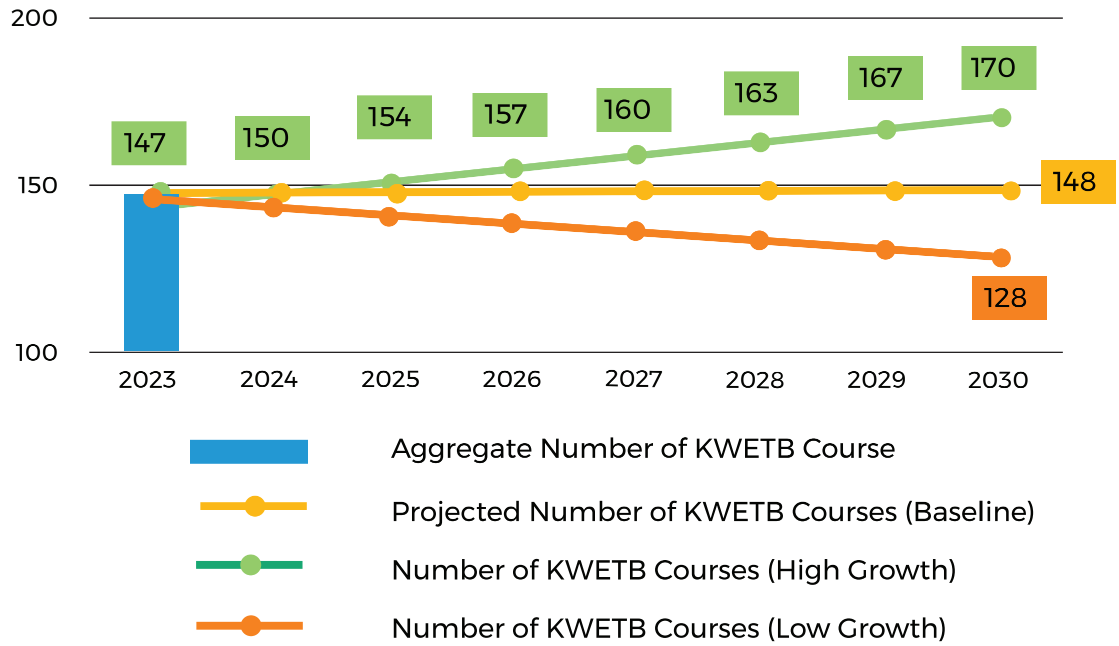
64 *Figure4.53 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.*

65 *The percentage of persons with third level degree working in equine and sports is estimated at 34%. For the projection of the HE skills demand, it is assumed that 50% of HEI graduates in equine and sports related courses will commence a profession in the sector*

### Figure 4.52: HEI Skills demand and National Graduates Required in Equine & Sports Sector




### Figure 4.53: Projected KWETB Courses Required in Equine & Sports Sector, 2024-2030



## 4.6 Key Sector Analysis 6: Tech and ICT

The tech and ICT sector is a significant employer in County Kildare and includes major multinational companies as well as an array of SMEs, start-ups, and indigenous businesses. It is supported in Kildare with a strong and educated pipeline of talent as well as a network of hubs to foster innovation and entrepreneurship in the sector. The sector has seen significant growth in the County, with the creation of high value and skilled employment contributing to Kildare's growing knowledge economy. While there has been a cooling of the sector globally with associated layoffs in the workforce, its potential and importance to the economy in County Kildare remains high.

The tech and ICT sector is a diverse sector that experiences high levels of innovation and change as technology advances. As such, along with the general talent needs of the sector, there are also changing needs in specific skills in areas related to key trends, advances, and innovation. The most on-topic trend currently is the emergence and potential uses for artificial intelligence and related large language models. The impact from the use of artificial intelligence is expected to be immense and may lead to disruption and efficiencies across a number of different sectors. In KPMG's 2023 Global Tech Report,[66] 57% of technology professionals spoken to "believed that AI and machine learning,including generative AI, will be important in helping them achieve their business objectives over the next three years".[67] Other areas highlighted as being important in the report included edge computing (including the Internet of Things), robotics and automation, ESG reporting and cybersecurity.[68]

Ensuring that a strong pipeline of talent continues to be available to the sector in County Kildare will be important to support its growth. This will require close collaboration and communication between the private sector and education and training providers to ensure that the training and education provision is meeting the rapidly advancing needs in tech and ICT. The below sections provide an overview of the workforce profile in County Kildare along with associated projections for the sector.

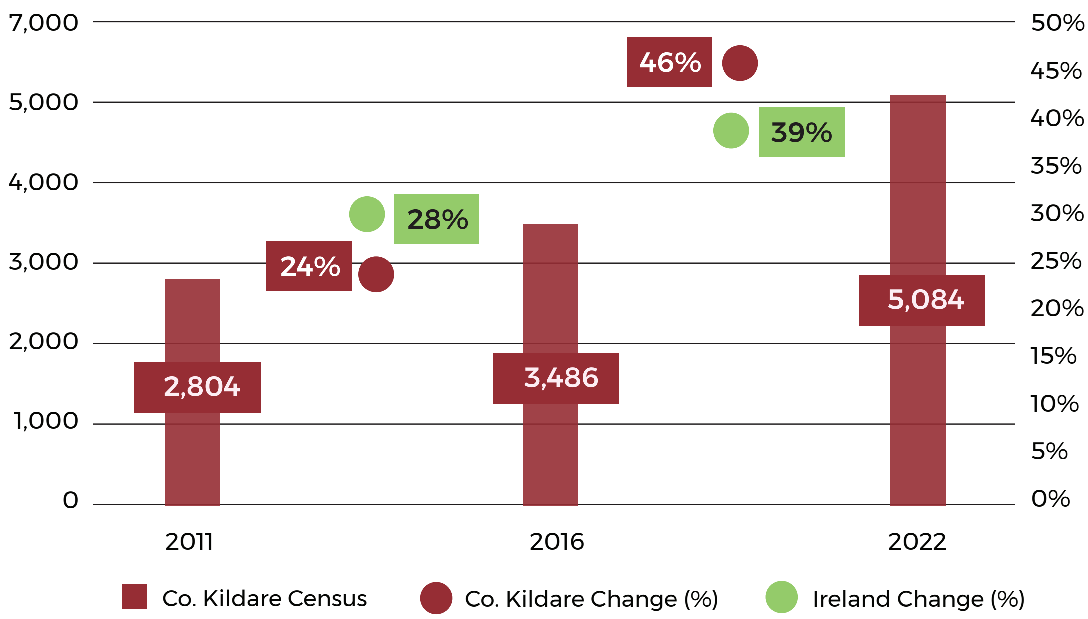
66 KPMG. KPMG global tech report 2023. (kpmg.com, KPMG, 2023). KPMG global tech report 2023
67 KPMG. The AI and Machine Learning boom continues to burn bright. (kpmg.com, KPMG, 2023). https://kpmg.com/nl/en/home/insights/2024/01/ai-machine-learning-global-tech-report.html
68 KPMG. KPMG global tech report 2023. (kpmg.com, KPMG, 2023). KPMG global tech report 2023

### 4.6.1 Sectoral Landscape in County Kildare

#### Workforce Profile

The tech and ICT sector is the fourth largest among the six business sectors examined in County Kildare. As of 2022, 5,084 persons (representing 4.1% of the labour force) operated in occupations in the sector. The sector underwent substantial growth, with 2011-2022 growth in Kildare (+81%) outpacing that of Ireland overall (78%). Furthermore, the sector is characterised by a high percentage of people with a third level degree. Due to increased suburbanisation from Dublin to County Kildare, a large number of professionals in this sector are assumed to commute to office locations outside County Kildare (mainly Dublin). With the skills based in County Kildare, however, this provides an opportunity for homegrown businesses to be established if favourable conditions are in place. Currently, the sector in County Kildare is dominated by small and medium sized enterprises, with large-scale enterprises mainly located within commuting distance in Dublin, with the notable exception of a global company based in Leixlip.

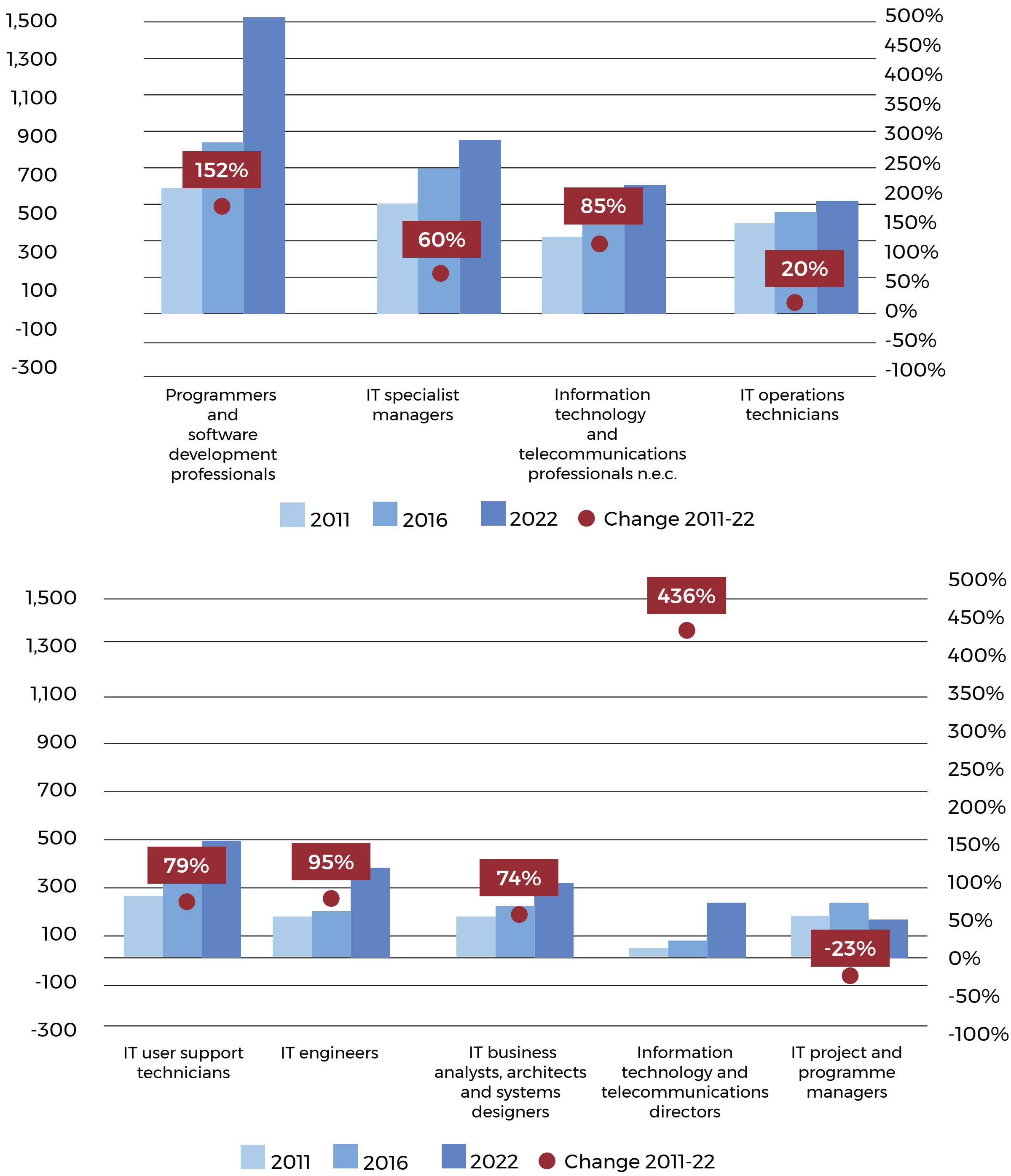
**Figure 4.54: Employment, 2011-2022**




Total employment in the sector can be further broken down into the nine occupations,[69] of which ‘programmers and software development professionals’ (30%) and ‘IT specialist managers’ (16%) account for almost half of all employees. In the period from 2011 to 2022, strong growth has been seeing throughout all occupations, with ‘programmers and software development professionals’ having undergone the strongest growth (+924 persons / +436%). The sector overall has grown by 81%.

[69] *These figures include Co. Kildare residents employed in the 9 occupations in or outside of Co. Kildare but exclude residents outside of Co. Kildare employed in Co. Kildare.*

**Figure 4.55: Tech & ICT Employment by Occupations, 2011-2022**



### 4.6.2 Projected Skills Demand

Projected 2030 employment figures in the tech and ICT sector take into account labour force trends, characteristics of the sports and equine workforce, and sectoral trends (both national and local). Three scenarios are derived based on the potential variability of these parameters. However, due to limitations in the current sectoral employment landscape and the volatility in recent employment trends, the scenarios presented below should be interpreted with the caveat related to the high degree of uncertainty they are characterised by.

Table 4.21 shows the number of Kildare employees in the tech & ICT sector in 2022[70] and forecasted employment figures for 2030 under three scenarios of baseline, high, and low growth employment expectations for this sector. The same scenarios, as well as past employment levels (2011, 2016, 2022), in sports and equine in County Kildare are displayed in Figure 4.56. Annual estimated growth for 2011-16 and 2016-22 and projected annual growth estimates for the three scenarios are displayed in Figure 4.57.

**Table 4.21: Scenarios for Projected Skills Demand in the Tech & ICT Sector**

| Employment 2022 (Census 2022) % Labour Market | Scenario | Forecasted Employment 2030 | Forecasted Growth 2022-2030 |
|---|---|---|---|
| 5,084<br>4.1% | High Growth | 7,373<br>5.0% | + 45% |
| | Baseline | 6,228<br>4.1% | +22.5% |
| | Low Growth | 5,660<br>3.9% | 11.25% |

*70 Based on CSO Census data on Occupations*

**Figure 4.56: Tech & ICT – Past and Projected Employment Trends, 2011-2030**

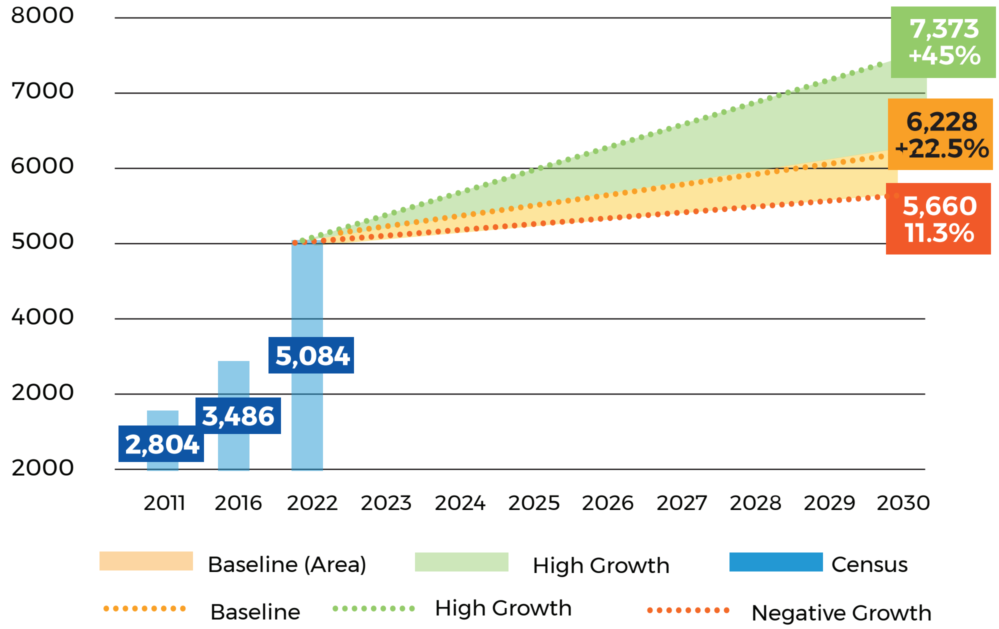
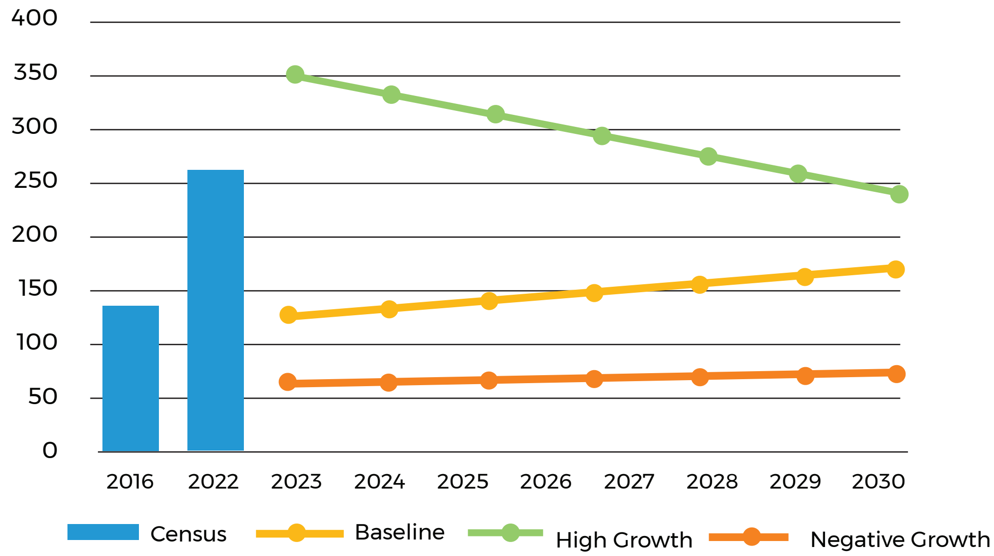



**Figure 4.57: Tech & ICT – Employment Projections Annual Change, 2016-2030**



### Baseline Scenario

Under the **baseline scenario,** the sector is expected to continue expanding. Underlying assumptions for this scenario include:

- Favourable international conditions around growth of the ICT and tech sector, partly driven by further developments in AI.
- Increased levels of tech entrepreneurship as County Kildare benefits from a skills base inflow from Dublin.
- Continued strong growth of County Kildare as part of the greater Dublin urban area, attracting a highly skilled workforce and further businesses to the County.

The projected growth of the labour force estimates an increase in the number of employees in tech & ICT occupations by 22.5% (amounting to 1,144 persons) reaching 6,228 persons in 2030.[71] The yearly workforce change (i.e., skills requirements) over the 2023-2030 period is shown in Table 4.22.

As the total County Kildare labour force is expected to expand over the projection period as well, the proportion of professionals in tech & ICT employment is expected to grow only marginally from the 2022 level of 4.1% to 3.2% of the County labour force.

**Table 4.22: Baseline scenario – Yearly change in tech & ICT occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +131 | +134 | +137 | +141 | +145 | +148 | +152 | +156 | **+1,144** |

### High Growth Scenario

The **high growth scenario** assumes that employment in tech & ICT will increase by 45% (2,289 persons) and will increase to 5% of the labour force by 2030.[72] The yearly workforce change over the 2023-2030 period is shown in Table 4.23. Underlying assumptions for this scenario include:

- Greatly improved international conditions accelerating growth in the ICT and tech sector including through increased innovation and emergence of new technology.
- Higher levels of tech orientated entrepreneurship in County Kildare.
- Accelerated growth of County Kildare as part of the greater Dublin urban area, attracting a highly skilled workforce and further businesses to the County.
- Improvements in infrastructure around housing (increased provision of affordable rental units and properties for sale) and transport (public transport, active modes, business-related/ freight transport) means Kildare becomes an increasingly attractive location to do business, work and live.

**Table 4.21: High growth scenario – Yearly change in Tech & ICT occupations**

| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +346 | +331 | +314 | +296 | +278 | +260 | +242 | +224 | **+2,289** |

[71] *The baseline growth scenario assumes 50% of the growth rate of the 2016-2022 intercensal period.*
[72] *The high growth scenario assumes the growth rate of the 2016-2022 intercensal period.*

## Low Growth Scenario

The **low growth scenario** assumes that the number of people employed in tech & ICT will increase by 11.25% (amounting to an increase of 571 persons).[73] As the total County Kildare labour force is expected to expand over the projection period as well, the proportion of professionals in tech & ICT employment is expected to decline marginally from the 2022 level of 4.1% to 3.9% of the County labour force. The yearly workforce change over the 2023-2030 period is shown in Table 4.24. Underlying assumptions for this scenario include:

- Disrupted growth due to a general economic downturn, or insecurity because of a sectoral crisis.
- Potential of business closures due to business-specific reasons.
- Sectoral worker layoffs.
- A decreasing level of competitiveness of County Kildare compared to other regions and countries due to a high cost of living and a limited availability of housing and transport.

### Table 4.22: Low growth scenario – Yearly change in Tech & ICT occupations

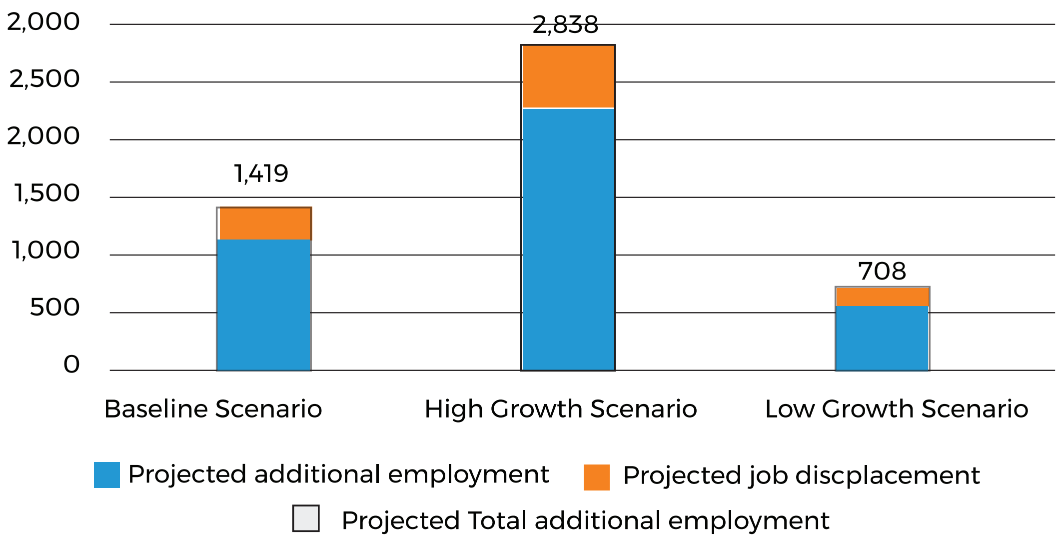
| 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Total |
|---|---|---|---|---|---|---|---|---|
| +68 | +69 | +70 | +71 | +72 | +73 | +74 | +75 | **+571** |

[73] *The low growth scenario is calculated as half of the baseline accumulative growth.*

### Projected Employment and Displacement

Figure 4.58 depicts projected employee displacement for each of the above scenarios. The total additional employment figure is calculated as the additional number of employees required to replace the jobs lost to displacement (employees that retire or change careers) and occupation growth presented in the three scenarios above. Including this additional need for employees, the baseline scenario would assume 1,419 additional jobs to 2030, the high growth scenario would assume 2,327 and the low growth scenario would assume a loss of 708 jobs.

**Figure 4.58: Tech & ICT– Projected Employment and Displacement, 2023-2030**

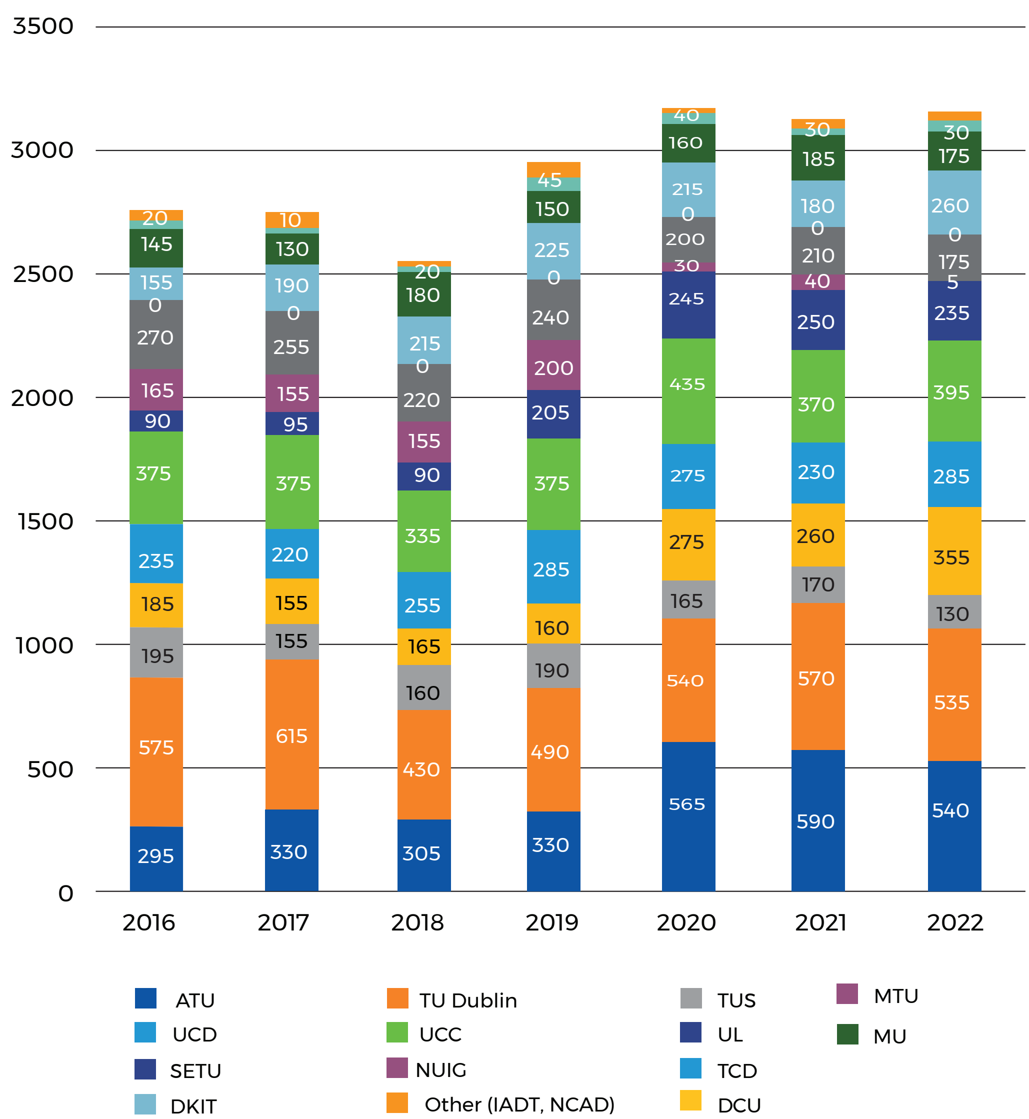



### 4.6.3 Skills Supply

From 2016 to 2022, the number of graduates in tech and ICT-related fields[74] has fluctuated between 2,760 and 3,155, with a general upward trend (Figure 4.59). Nearly one-fifth (18%) of graduates came from TU Dublin, another 14% from ATU and 13% from UCC. While the numbers of graduates from TU Dublin and UCC have remained relatively stable, ATU has experienced a significant growth in their number of graduates. Other third-level institutions with notable growth include University of Limerick and DCU, while MTU, TU Shannon and SETU have experienced a decline in the number of graduates. Over the period 2016-2022 the percentage of graduates from institutions in the vicinity of County Kildare (Dublin, Dundalk, Carlow/Waterford, Maynooth) has remained stable between 55% and 60% of all graduates.

[74] *HEIs data related to programmes categorised under '(0610) ICTs not further defined or elsewhere classified', '(0611) Computer use', '(0612) Database and network design and administration' and '(0688) Interdisciplinary programmes and qualifications involving ICTs' are considered relevant for these statistics.*

**Figure 4.59: Graduates from HEIs in 2016-2022 in programmes related to Tech & ICT**




The Kildare and Wicklow Education and Training Board (KWETB) provides various types of training courses and certificates relevant to the tech and ICT sector. KWETB offers a total of 1,640 places within eight different course categories (Figure 4.60). Among all sectors examined, this represents the highest number of course places per statistically employed person in the sector. The highest capacity is registered in 'Skills to advance' (55% of all course places), followed by 'FET Pathways from School' (26% of all course places offered).

Within these categories, a variety of 33 course are offered, of which three courses stand out as providing the highest number of course places: 'Automation and AI in accounts', 'Professional Scrum Master 1 (PSM1)' and 'Universal Robots (UR) Core Training, together accounting for 30% of all course places. Other courses range from programming languages to creative media, data visualisation tools, cyber security, and digital marketing tools, among other content.

It is important to note, that the variety of courses offered are not limited to professions in the tech and ICT industry but are also relevant for professions outside of this sector. While a significant number of course places are provided online (68%), in-person teaching is taking places in Celbridge, Newbridge, Athy, and Naas.

**Figure: 4.60: Category of KWETB training courses relevant to Tech & ICT**

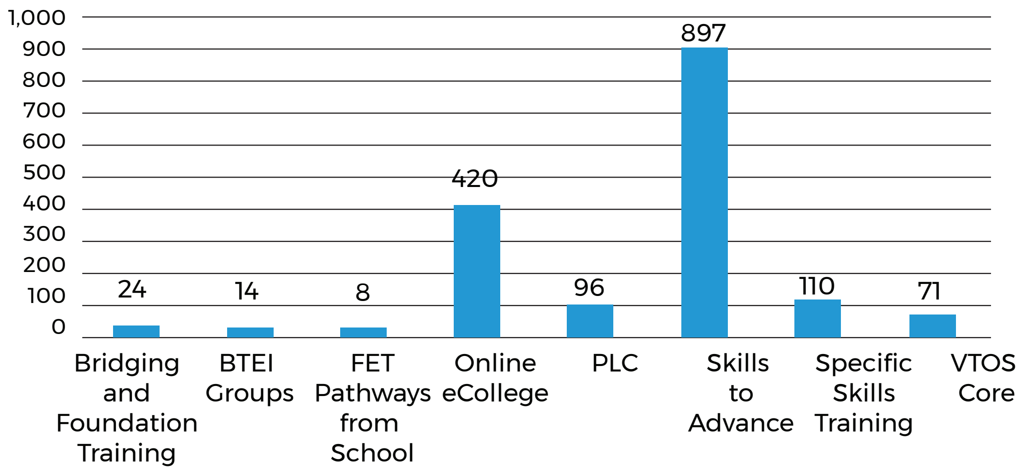


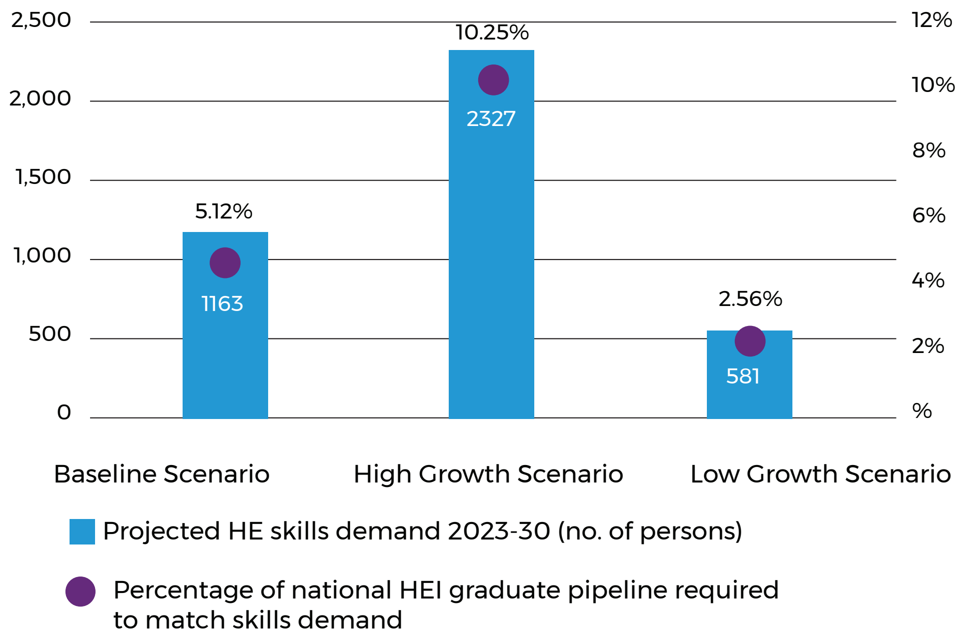

**Figure 4.61: Capacity of KWETB training courses relevant to Tech & ICT**

| Course name | Number of places |
|---|---|
| Automation and AI in Accounts | 180 |
| Professional Scrum Master 1 (PSM1) | 160 |
| Universal Robots (UR) Core Training | 152 |
| Business & Digital Marketing (Business Studies) | 64 |
| ICDL (Online ECollege) | 60 |
| Microsoft Excel 2019 (Online ECollege) | 50 |
| Microsoft Word 2019 (Online ECollege) | 50 |
| Computer Science & Software Development (Software Development) | 48 |
| Certificate in Industrial Instrumentation Calibration | 40 |
| ICDL Insight Artificial Intelligence | 40 |
| Introduction to 3D Printing | 40 |
| IT Specialist in JavaScript (Online E-College) | 40 |
| IT Specialist in Python | 40 |
| 3D Certified User Training | 32 |
| Microsoft PowerPoint 2019 (Online ECollege) | 30 |
| E-Business with Digital Marketing Level 5 ; Skills to Compete | 22 |
| Certified Digital Marketing Professional - CDMP (Online ECollege) | 20 |
| CompTIA Computer Fundamentals | 20 |
| Fundamentals in AWS Cloud Computing | 20 |
| Fundamentals in AWS Cloud Computing (Skills to Advance) | 20 |
| ICDL – Online E-College | 20 |
| ICDL Data Analytics Foundations | 20 |
| ICDL Data Protection | 20 |
| ICDL Workforce Cyber Security | 20 |
| Microsoft Excel: Data Management and Validation | 20 |
| Microsoft Excel: Fundamental Understanding of Data Tools | 20 |
| Microsoft Excel: Organising Data, Vlookup and Hlookup | 20 |
| Microsoft Excel: Working with Charts and Graphics | 20 |
| PRINCE2 Foundation (Online ECollege) | 20 |
| Python Programming (PCEP) Certified Entry level | 20 |
| Software Apprenticeship Phase 4 | 20 |
| Creative Media | 18 |
| Creative Media | 15 |
| Digital Skills for Business | 15 |
| Digital Skills for Business - Digital Business Solutions | 15 |
| Microsoft Excel: Utlising Formulae and Functions | 15 |
| Microsoft Excel: Data Analysis using Pivot Tables | 15 |
| Professional Agile Leadership Online | 15 |
| Social Media for Business | 15 |
| SOLIDWORKS Awards | 15 |
| Digital Marketing - Level 5 (Skills to Compete) E | 14 |
| Certificate in Industrial Electrical Safety & Systems | 12 |
| Other | 128 |

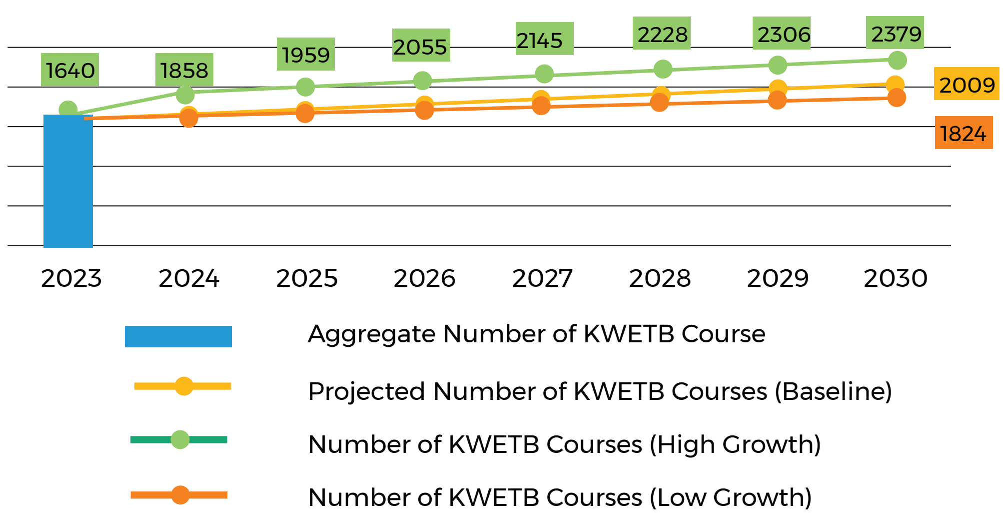
## Matching Skills Demand and Supply

The below figures outline projections relating to the potential need for an increase in skills training and supply based on the growth scenarios found in Section 4.6.2. Figure 4.62 uses the growth scenarios to anticipate the increased number of higher education (HE) graduates that would be required to be added to the tech and ICT sector workforce in County Kildare and the number of national HE graduates that would be required to meet demand under each projection scenario to 2030. Figure 4.63 illustrates the increased amount of programme capacity KWETB would need to match demand in the sector in line with the projection scenarios to 2030.[75]

### Figure 4.62: HEI Skills demand and National Graduates Required in Tech & ICT Sector




### Figure 4.63: Projected KWETB Courses Required in Tech & ICT Sector, 2024-2030




[75] *The percentage of persons with third level degree working in equine and sports is estimated at 82%. For the projection of the HE skills demand, it is assumed that 90% of HEI graduates in tech and ICT related courses will commence a profession*

Comhairle Contae Chill Dara
Kildare County Council

# County Kildare
# Skills Strategy 2024- 2030

# 5 Stakeholder Consultation and Industry Engagement

This section provides an overview of the stakeholder consultation process and its key findings. The stakeholder consultation process aimed to develop a comprehensive understanding of the key sectors outlined above as well as any issues and skills gaps that exist and ideas on how these could be addressed. Findings from the consultation process as well as the analysis of available data will inform the development of actions for the finalised skills strategy.

The consultation process included a survey, workshops, 1-1 interviews as well as the ability to submit written inputs. The process ran from May – July 2024. An overview of the various elements of the consultation are as follows:

- **One-to-one interviews:** 15 interviews were conducted. The interviews with key stakeholders included training and education providers, sector representatives and local and national agencies.

- **Sectoral Workshops:** 6 sectoral specific workshops were conducted over the course of June 2024. The workshops were advertised and circulated through relevant business networks with representatives of the various sectors attending the sessions where discussions focused on the needs, issues and ideas for each sector in Kildare.

- **Business Survey:** The business survey was open for 9 weeks from the 13th of May to Friday Monday 8th of July. A total of 219 responses were received from a wide range of stakeholders.

- **Written Submissions:** In addition to the other strands of the consultation process, written submissions were welcomed as part of the engagement including from those who attended the workshops and interviews.

The sections that follow outline key findings from the consultation process. This includes an overview of the analysis of the survey, as well as key sectoral findings from the workshops, interviews and written submissions. The sectoral consultation analysis includes findings relating to challenges, supports, skills shortages and needs, both on a cross-sectoral and sector by sector basis.


## 5.1 Sectoral Workshops, Interviews and Written Submissions

Key findings from the sectoral workshops, one-to-one interviews and written submissions are outlined in the sections that follow. Participation and inputs were received from a wide range of stakeholders including the private sector, state agencies, the Local Authority and education and training providers. Feedback and ideas gathered from these sessions have directly informed the development of the actions for this strategy ensuring that it is reflective of the views of the businesses and people of Kildare.

Whilst there are unique challenges to each of the six sectors identified for the Kildare Skills Strategy, there are also significant common challenges and issues. Some of the key overlapping themes that came out of the analysis of feedback from the consultation were as follows:

- ***Staff shortages and retention issues***
  Challenges in relation to staff shortages and retention issues were evident across many of the sectors. The roles that are proving challenging to fill and the extent of the issues being faced vary by sector. The tech & ICT sector appears to have the least issues in this regard. Conversely the **tourism, hospitality, leisure & retail sector, equine sector and agriculture sector appear to have larger issues with staffing and retention.** This was in part due to the nature of the work which did not suit everyone, the competition between larger and smaller employers on wages, and the higher wages available to candidates in places like Dublin. Furthermore, the lack of more defined bene fits and career progression plans in sectors such as agriculture and retail and hospitality contributed to issues around attraction and retention.

- ***Accommodation and public transport***
  Key constraints highlighted in relation to attracting people to work in Kildare were issues with accommodation and public transport. These were brought up by all participants, across all sectors and were cited as major issues. The **price and availability of housing and accommodation** restricted the ability to move to the County for work with a number of employers suggesting that they had explored options to provide accommodationfor employees directly. Similarly, **limited public transport posed challenges for commuters and employers.** This restricted the shifts that staff could work and also affected the ability of employers to attract and retain staff.

- ***Greater engagement with education and training providers***
  A recurring theme across all sectors was the need for greater engagement and collaboration with education and training providers. This included general engagement to **understand what courses were available, who to contact and how to access them**, with some participants uncertain on how to obtain such information or unaware of what was available. Similarly, there was a need to enhance collaboration and engagement around the development of curriculums to ensure that the needs of employers are being met and the correct skills are being taught. **The specific needs varied by sector**, but it was felt that greater and more regular engagement was needed to ensure that education and training courses kept pace with advances and changes in each sector. There was also a very **clear demand and need for short courses** that could either be completed online or on the premises of the employer. Offsite courses were looked upon less favourably. The development of micro credential courses was seen as a positive development.

- ***Apprenticeships and tradespeople***
  There was general agreement during the consultation for the need for a **greater provision of apprenticeships in the County across all sectors** where relevant and appropriate. It was felt that this would also facilitate pathways to employment outside of the traditional university route including in areas such as tech, supply chain and logistics. Similarly, it was felt that enhanced awareness raising was needed to encourage the uptake of apprenticeships and the opportunities available. Notably, **tradespeople were in high demand across a number of sectors** with shortages in these skillsets evident. This included demand for tradespeople in the construction and engineering sector, the agriculture and food manufacturing sector, logistics and distribution sector, and tech & ICT sector. Another important point was that **all of the sectors were drawing on the same pool of tradespeople** with both large and small companies competing for the same limited workforce.

- ***Sustainability and the green economy***
  A key point that was highlighted during the consultation was related to the transition to a more sustainable future. The need for supports and skills in the areas of sustainability to support this transition was highlighted repeatedly during the consultation. The requirements for these skills covered many areas of business and operations across all of the sectors. This included both **opportunities to provide services (e.g., retrofitting) as well as internal needs around sustainability reporting and adopting more sustainable practices.** With the enhanced focus and greater acceleration towards a more sustainable future, it was felt that the demand for skills in this area will likely increase.

- ***Managerial and leadership skills***
  The need for candidates with adequate managerial and leaderships skills was prevalent across many of the sectors. This was true even in sectors that are facing less issues with attracting staff although it was noted that was for more niche roles in such cases. **Gaps in management and leadershipskills were noted across the engineering, equine, tourism, hospitality, leisure and retail sectors.**

- ***Soft skills***
  Across multiple sectors, the shortage of soft skills was highlighted as an issue. This included a number of different skills such as **teamwork, adaptability and resilience.** However, **communication** skills were seen as a key area for improvement. This was mentioned in relation to the tech & ICT sector, but also more generally in younger cohorts across a number of the sectors. In some cases, participants felt that the gap in communication skills may have been exacerbated during the pandemic with reduced in-person interactions making it more challenging for employees to develop such skills.

- ***Logistics and supply chain skills***
  While a very specific area of expertise, the shortage and demand for workers with experience in the area of supply chains and logistics was highlighted, particularly in relation to the agriculture and food manufacturing sector and the logistics and distribution sector. An integral part of many businesses, it was noted that such roles were said to **be hard to fill and it was perceived that there was a limited number of logistics and supply chain courses in Ireland** in comparison to other European countries. Furthermore, it was highlighted that the demand for sustainability managers in corporate supply chains was likely to increase as further policy and regulation changes were enacted at the EU level.

- ***Digital skills and data analytics***
  The demand for digital and data analytics skills was notable across many of the sectors. This included the need for supports and upskilling in **digital skills and transformation in the tourism, hospitality, leisure & retail sector and the construction sector.** In a different form, data analytics roles and data engineers were also said to be in demand in both the logistics and distribution sector and the tech and ICT sector.

- ***Promotion of County Kildare and enhancing awareness of career opportunities***
  A common recurring theme was the need for greater promotion of County Kildare as a place to live and work, and enhanced awareness raising of the career opportunities that exist. It was felt that this should be done in **collaboration and coordination with the private sector and include community outreach** to help foster greater understanding of the sectors, the benefits they bring to the economy and the variety of roles in which one can pursue a meaningful and fulfilling career. However, it was noted that marketing roles, which could help with business and sector promotion, were difficult to fill in the County.

- ***Networking and collaboration***
  A number of participants during the consultation noted the benefits that business networks and forums could bring to Kildare and the good work done by the likes of LEO and Kildare Chamber. However, it was felt that some sectoral areas, such as those relating to logistics and supply chain, would benefit from the **establishment of a network or forum** where companies and individuals working in similar areas could share knowledge and insights, as well as potential solutions to issues that they faced. Similarly, **conferences, events and jobs fairs were noted as important ways to highlight opportunities** in the sector, network with similar companies and connect employers with potential employees.

***The following sections set-out key findings from the analysis of the consultation process covering each of the six sectors.***

### 5.1.1 Agriculture and Food Manufacturing

**During the consultation process a number of challenges, needs and issues relating to businesses categorised as belonging to the agriculture and food manufacturing sector were highlighted. Key findings arising from the discussion are outlined below.**

- **Difficulties** in sourcing and retaining labour were noted particularly in relation to general farm labour, contractors and drivers of farm machinery. It was felt that the **nature of agriculture workmeant that it was not suited to every one** with constraints such as the demanding work, long working hours, and renumeration being highlighted.

- **It was also highlighted that in some cases, farmers may not perceive themselves as traditional employers.** This can result in unclear career progression for workers and a lack of standardised leave policies and benefits that may be available in other sectors. Such issues can further impact the attractiveness of the sector and efforts to retain and secure a stable workforce.

- The **food manufacturing** industry was also noted as experiencing difficulties in certain areas with it being highlighted that advertised roles were taking a **considerable amount of time to fill.** This included qualified technicians and trades people both for lab based and operational roles. **A lack of trade and maintenance people,** particularly mechanics (non-vehicle), was also noted in relation to **maintenance of machinery including in the lab.** Similarly, a shortage of engineers as well as R&D and STEM based skills was also noted by some of the participants involved in food manufacturing.

- More generally, it was noted that **financial and procurement roles were challenging to fill.** For more junior roles, it was highlighted that potential staff were often **unable to relocate or source travel to Kildare,** while for more senior roles there was a smaller pool of candidates to draw from. As such, it was stated by some participants that they often went **overseas to fill roles.** Language skills were also highlighted as a gap in some of the more internationally orientated business.

- Skills relating to **logistics and the supply chain,** which is an important element of agriculture and food manufacturing businesses, were noted as a specific shortage. Participants highlighted that it was difficult to fill roles in these areas, including candidates with skills and knowledge relating to logistics strategies and analytics. Similarly, it was felt that there was a gap in skills in the area of sustainability with demand for such skills likely to increase.

- **Housing and transport challenges** were highlighted as constraints. While Kildare does havea train, it was felt that connections via public transport in the County were limited and often caused issues for workers that are looking to commute from neighbouring areas, including Dublin. Onward connections to places of employment in the wider County from train stations were noted as an issue. The availability and cost of housing and accommodation was also highlighted as a constraint with some employers providing accommodation on-site to help address the issue.

- In relation to education and training for the Agriculture and Food Manufacturing sector in Kildare, it was felt that **greater collaboration and engagement with education and training providers was needed** to ensure that the courses on offer are meeting the needs of employers. Similarly, it was suggested further **awareness raising** needed to be conducted on the courses and training that were available in the County as well as encourage young people into apprenticeships given the need for tradespeople across a number of areas in the County.

- It was also highlighted that **training supports and provision in relation to advanced technology and processes** in the agricultural sector, such as robotic milking systems and GPS-based soil monitoring, were needed to ensure that famers, who may not view themselves as traditional employers, to assist with the establishment of more standard employment conditions in support of greater retention.

- It was felt that there was a need for a greater provision of courses and training in the areas of logistics and supply chains given the difficulties in securing the necessary staff with these skills. Ensuring a workforce with the required **skills in sustainability** to support the sector was also noted. Soft skills were also noted as a potential area for improvement, particularly in relation to the younger workforce.

### 5.1.2 Construction, Engineering, Energy

**The construction, engineering and energy sectors in Kildare cover a variety of different businesses. Views put forward during the consultation came from a number of different sources and included representatives from SMEs and larger multinational businesses. Key findings from this sector are highlighted in the following points.**

- Issues highlighted during the consultation were both particular to specific roles as well as more general in nature aligning with what was found in other sectors. Some participants felt that **availability of qualified engineers (university degree), at least at more junior levels, was satisfactory.** However, it was noted that some participants did have a general issue in filling technician level roles (i.e., individuals holding qualifications below NFQ8) including roles related to mechanical engineering. It was also important to understand that multinational companies were drawing on talent from a broad range of sectors in the County including the trades such as mechanics, plumbers, and electricians.

- It was also noted that some businesses faced **challenges in securing experienced hires with the correct managerial/ leadership skills in engineering.** A specific example was for senior commissioning managers for data centres, with it being noted that while there was a sufficient pool of talent with experience in this area but very few candidates with managerial/leadership experience, meaning that such roles were hard to fill.

- The **lack of available tradespeople** was discussed heavily during the consultation from a number of different businesses covering construction, engineering and energy. It was clear from the engagements that there appeared to be a shortage in general availability as well as in relation to a pipeline of skilled tradespeople being developed. Itwas noted that tradespeople that have gone through training with multinationals may have a very niche focus which means that additional training may be required when they join a more domestic or general construction-based businesses.

- A **shortage of architects** was also highlighted. Notably it was suggested that this was not necessarily due to a shortage of skills or qualified people in Ireland. It was felt that there was a strong pipeline of graduates with the required skills, but that this talent pool was concentrated in Dublin and perhaps some other large urban areas/cities The difficulty was in attracting architect graduates or experienced hires to work in Kildare, with some companies filling architectural roles with candidates from overseas.

- Attracting and retaining a skilled workforce to County Kildare was noted as challenging from businesses representing Construction, Engineering, Energy. Similar to other sectors, it was suggested that this was due to **limited housing availability and commuting and transport issues,** particularly from Dublin. The vast majority of participants noted that obtaining visas for workers was straight forward and simple, but again the housing issue was the biggest hurdle to bringing workers to Kildare.

- **A gap was noted in relation to digital skills and digital transformation.** This was said to be particularly an issue in relation to construction and the trades. The uptake of digital transformation across the construction sector was said to vary widely. The use of AI and the benefits that it could bring was also highlighted with a potential gap noted in the provision of training in relation to the development of skills associated with its use.

- **Stronger partnerships and collaboration between the private sector and education and training providers was seen to be essential.** A potential mismatch in skills and training provision was noted particularly in relation to the construction sector. It was noted that some graduates have very broad-based skills and many lacked more practical experience. It was also felt that in some cases greater communication was needed between employers and education providers to ensure that students that may have more advanced learning needs or difficulties are adequately supported.

- On the engineering side, it was felt that the **pandemic had a negative effect on the development of technical skills** due to the absence of physical labs during COVID. Furthermore, **communication skills in the younger workforce were seen to be an issue,** with this being noted in relation to both engineering and construction. Skills needs relating to retrofitting and related regulation was also highlighted.

- It was agreed that organisations like KWETB and LEO provide valuable training courses and resources, but better communication is needed to ensure businesses are aware of these supports and who to contact. As such, it was felt that increasing communication between sectors, local and national organisations, and **raising awareness of training opportunities through campaigns and partnerships would be crucial.** Similarly, it was suggested that regular **networking events and job fairs could connect employers with potential employees** and other industry stakeholders, fostering a collaborative community that supports growth and innovation.

### 5.1.3 Equine & Sports

**Equine is an important sector with an extensive history in County Kildare. There was good engagement with the sector over the course of the consultation process with a range of companies and representative bodies contributing to the process. Key findings from the consultation are highlighted below.**

- While globally the equine sector was noted as contracting, it was highlighted that t**he sector in Ireland has actually experienced growth in relation to its contribution to GDP.** It was noted that there are always roles that need to be filled in the sector with shortages both directly in the equine sector as well as in supporting industries and roles. A shortage of equine vets was highlighted by a number of participants. Similarly, there was said to be an acute shortage of equine pathologists with difficulties filling roles even when trying to recruit from an international talent base. It was also felt by participants that **students and graduates were not fully aware of the opportunities that existed in the sector.** It was suggested that student vets or recent graduates that did work in the sector often lacked farm experience, and many left the sector to work elsewhere.

- Other **shortages include work riders to exercise horses, stable workers, and grounds staff. A gap in managerial and supervisory roles was also highlighted** including in the breeding of horses, for example, senior stud management roles. Furthermore, a reduction in the number of insurance companies willing to cover equine farms and stables was highlighted with issues around health and safety and related documentation being cited. Furthermore, it was acknowledged that it was difficult to attract health and safety professionals into the sector.

- It was also indicated that it was **hard to put an exact figure on the number of people working in the sector** as often in the sector. Similarly, it was noted that people may also see roles in the sector as a **temporary job to bridge** them between other careers or to get money and experience to move abroad. It was also suggested that the **renumeration available in the equine sector cannot compete with other sectors** and the benefits available from the likes of large multinationals. As such, the attraction and retention of talent is an issue across the sector.

- Furthermore, participants during the consultation suggested that there is a very **limited pipeline of talent** being developed to support equine businesses and people are not being encouraged to stay in the sector. Also, with more people further removed from country/farm life, there is **less awareness of the opportunities** that are available and a lower knowledge of farm skills in students and graduates. Adding to this was the **difficulty equine businesses often faced in relation to visas** when bringing in workers from abroad as most farm and stud positions are classed as non-skilled position. Participants were eager to point out that this was not correct, as generally the individuals that equine businesses would be seeking to bring into the country for work would be highly skilled in working with high value animals in the equine sector.

- In relation to attracting people to work in equine businesses or roles, it was felt that **better marketing of the sector** could be conducted including through enhanced community outreach and engagement as well as in post-primary education. This should include highlighting the benefits and contribution of the sector to the economy and the excellent reputation Ireland has in this area internationally. However, it was felt that the budget and skills to do this were currently unavailable.

- Furthermore, like other sectors in the County, **accommodation shortages were highlighted as a constraint** in attracting people outside of Kildare to work in the sector with some employers resorting to letting people live on-site or in their own residences.

- Generally, it was felt that there needs to be **more engagement between the equine sector, education and training providers, Kildare County Council (KCC) and national agencies and departments.** This was to ensure both a greater awareness of the opportunities that exist in the sector as well as to ensure that the issues the sector is facing are understood and that the skills needs of employers are being met. While the industry did have **upskilling and training courses available** at FETAC level and through the likes of the Irish Thoroughbred Breeders' Association (ITBA), it was noted that **a number of universities had dropped their provision of equine related courses.** It was felt that the sector sat outside the Department of Education in relation to training and that KCC could assist the sector in developing a greater relationship with central government to help address skills shortages and needs.

### 5.1.4 Logistics & Distribution

**The logistics and distribution sector has been identified as an area of potential growth for County Kildare owing in part to its proximity to Dublin, transport infrastructure and existing companies. Over the course of the consultation process good insights on the sector were received with key findings outlined in the points that follow.**

- **Challenges relating to commuting and limited public transport** were highlighted as constraints in attracting staff to the sector in Kildare. This included the lack of connecting services from Naas train station and an unreliable bus service. Similarly, it was noted that while the bike to work scheme was a good initiative, it couldn't work in Kildare if the infrastructure to support cycling to work was not in place. Some participants noted that for shift workers they had to organise taxis to ensure that their employees got home safely.

- The challenges related to commuting were compounded by the nature of the work in the logistics and distribution sector which has **less flexibility for remote or hybrid working meaning** that people often have to be on-site. Similarly, the limited ability for remote or hybrid working means that the work is not suited to everyone with some finding the offer of hybrid working in other sectors more attractive.

- **The housing and accommodation issue** in County Kildare was also highlighted as a major constraint in the County. It was the opinion of participants that not enough was being done at a national or local level to address this issue. It was felt that real thought had to go into how the housing issue could be addressed and creative solutions need to be suggested and implemented.

- **Staff and skills shortages** were noted across the areas of logistics and supply chains with specific roles mentioned including project managers in logistics, carrier and logistics managers, transportation management system managers, carrier integration managers and roles relating to freight settlement and freight auditing. Data analytics roles were noted as also in demand with participants highlighting that candidates generally had good data analytics skills but were often missing how it relates to logistics. This meant that data analytics employees often had to be upskilled after joining. This **training was mostly being developed and implemented in-house.** Furthermore, it was highlighted by some participants that many of their data administrators and data engineers lived in Dublin and had to commute to Kildare.

- An important area for skills development in the logistics and distribution sector was that of **sustainability.** It was highlighted that **new regulations that will be enacted at the EU level will mean that sustainability in relation to procurement and supply chains** will become an important area for all businesses with due diligence required to ensure that the environment is not being negatively impacted. As such, the demand for sustainability skills in relation to supply chains will increase drastically over the coming years. An example of a related role that is currently in demand and for which demand will increase is sustainability managers in corporate supply chains.

- **Language skills** were also in demand due to the international nature of logistics and distribution. It was highlighte that the demand for French, German and Spanish speakers was increasing. In relation to soft skills, communication skills particularly in younger employees was highlighted as an area that needed improvement. It was also suggested that **expectations from graduates in relation to benefits, salary and flexibility were very high.** It was noted that the salary levels in County Kildare were lower than in Dublin.

- On the provision of training and education for the sector it was felt that Ireland in general has a l**ower level of available courses for logistics and supply chain management than other European countries.** Furthermore, it was felt that there was **less awareness of the opportunities** available in the sector. This contributes to a small talent pool and issues with resourcing. It was felt that greater collaboration and engagement was needed with education and training providers to understand existing provision (including in relation to apprenticeships), the needs of the sect and also to engage with students on the careers and opportunities that are available.

- **Greater collaboration and communication within the sector is needed.** It was felt that a logistics and supply chain network or forum, with regular discussions would be of benefit to **share information on issues, solutions and other areas** of interest in the sector. More generally, it was felt that more shoul be done to market County Kildare as a place to live and work, and any such campaign should involve the private sector as well as the County Council.


### 5.1.5 Tech & ICT

**The tech & ICT sector is an important sector within the County and includes some major employers. There was good engagement on the sector with a range of ideas, views and issues highlighted during the consultation process including from both large and small businesses. Key findings from the consultation are outlined in the following points.**

- It was noted that companies are generally finding **a strong pipeline of graduates** for junior roles. However, it was felt that in some cases the **graduates are being taught in specific areas with too narrow a focus.** It was suggested that it would be better for students to learn a wider and more general curriculum with greater understanding of the theory and the principle of the skills that are being taught. Similarly, it was seen to be important for graduates to be adaptable, have more practical skills and increased business acumen.

- Some issues and challenges were highlighted in relation to more experienced candidates. This included **salary expectations,** particularly from individuals that may have been laid off from larger tech companies over the course of 2023 and 2024. It was noted that in some cases such individuals have struggled to match the salaries that they previously obtained. Furthermore, the salaries of some roles have dropped dramatically due to the layoffs (and abundance of people looking for jobs) and there was uncertainty over whether or when similarly high salaries would be available again. These lower salaries were noted as being beneficial to smaller companies and start-ups.

- Furthermore, it was highlighted that some of the more experienced candidates that worked with larger tech companies had a very specific area of responsibility and focus which did not necessarily transfer to other businesses. Therefore, it was suggested there may be a need for these **individuals to upskill to increase their employability and align skillsets with the wider sector's needs.**

- It was also highlighted that the **costs/salaries associated with coding and web development roles in Ireland was very high** and as a result, some companies, particularly smaller companies and start-ups, were outsourcing these roles as they find them too expensive to hire locally.

- It was suggested that there may be a slight difficulty in filling some of the more experienced roles, though this was caveated in that the area of expertise that is being sought **continuously changes as technology advances.** Key experienced roles that are in demand currently and are sometimes hard to fill were generally noted as being in areas relating to AI and large language models (LLM). Reference to other skills that were in demand included data analytics, digitisation, and sustainability. It was also felt that communication skills in the sector generally could be improved, though this varied by participant.

- An issue that was proving challenging was around the level of diversity present in the sector. This was mentioned as an issue both in relation to graduates coming into the sector as well as entrepreneurs e.g., female founded start-ups. It was felt that there could more awareness raised around supports available for women in tech and more done generally to encourage diversity in the sector.

- Constraints highlighted in relation to attracting both people and companies to Kildare included issues with transport and commuting, the availability and cost of housing and accommodation, and access to GPs and schools.

- As noted in relation to education and training, it was felt that a broader curriculum may be more beneficial for students. Enhanced and more regular engagement between the private sector and education and training providers, including SOLAS, to ensure that courses were aligned with needs of employers and advances in technology was also seen to be vital. Similarly, it was felt that education and training providers need to be flexible in

### 5.1.6 Tourism, Hospitality, Leisure & Retail

**Tourism, hospitality, leisure, and retail businesses provide important services and across the County. It includes larger and smaller companies which are the backbone of the County's economy. Key findings from the consultation are as follows.**

- Businesses operating in the tourism, hospitality, leisure and retail sector face a number of issues relating to staffing challenges and shortages. A number of participants noted issues in attracting and retaining staff. For instance, in businesses that operate tourism attractions it was highlighted that it is difficult to provide full-time permanent positions due to the seasonality of the work and fluctuating visitor numbers. As such, the ability to retain staff is low due to the uncertainty and nature of the business.

- Similarly, hospitality and retail businesses highlighted that a significant portion of their staff are students. When the holiday season ends and education restarts, these businesses face staffing challenges. It was also noted that young people and students do not view hospitality and tourism as viable long-term careers. Retention issues are reportedly widespread throughout the sector. Limited career progression prospects were also adding to issues with retention and the ability to attract workers, although Fáilte Ireland's employer excellence programmes were noted as a positive initiative in this regard. It was felt that raising awareness of the careers opportunities available and having formal career paths in place would be important to attract workers to the sector.

- Housing and accommodation was another constraint around attracting staff to work in the sector, with suggestions that many people cannot find or afford accommodation in the County. Similarly, for those commuting to work, limited public transport options restricted the shifts that they could work in the sector.

- In relation to staff shortages, it was noted that chefs, waiting staff, event and wedding coordinators and marketing positions are difficult to fill and retain. Furthermore, finding retail managers with the required skills and experience was said to be challenging. Constraints in attracting staff included salary expectations, with higher pay available from larger employers and higher rates of pay being available in Dublin, as well as the work-life balance associated with the sector (e.g., working weekends, evenings, nights). It was noted that larger retailers had less issues than smaller companies in attracting staff.

- Participants were also of the view that there was a need for more joint up thinking and coordination to promote the County to workers, businesses, and visitors. It was noted that corporate tourism and conferences were very important for the hospitality sector.

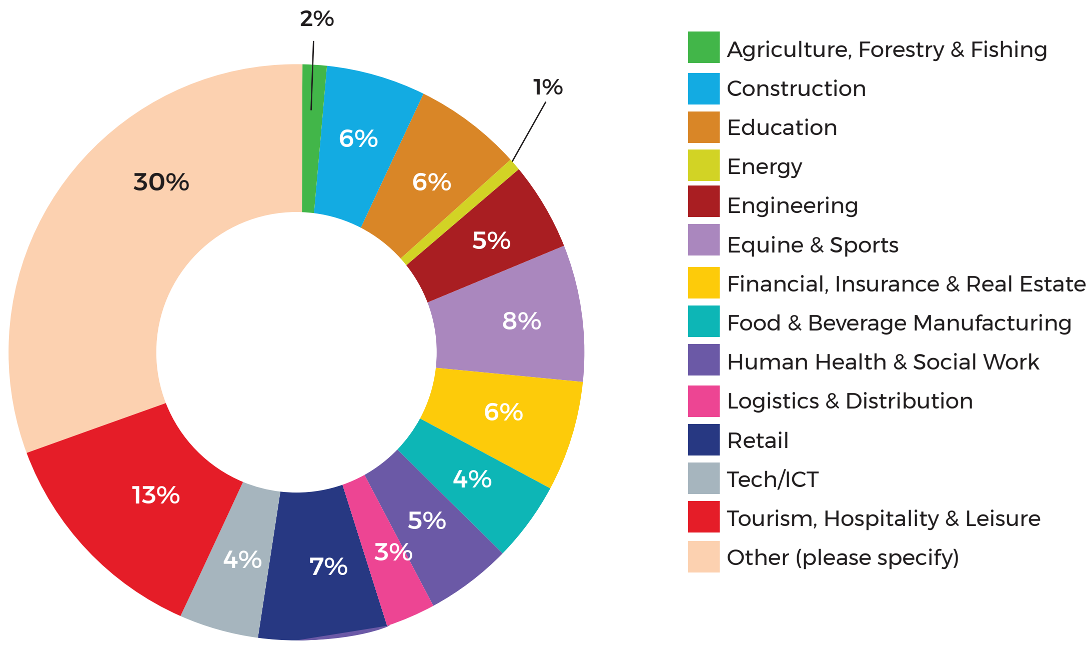
- Areas suggested for skills development and training in the sector included digital skills and transformation (including AI), customer service, managerial and leadership skills, marketing skills (including digital marketing and social media) and training for chefs. It was noted that there are good supports and courses available from the LEO and education and training providers such as the KWETB, but it was felt that more were needed. One of the key points highlighted was the need for short training courses that can be done remotely or onsite at the premises of the employers. Many participants noted that they simply could not afford to have employees attend training offsite for a number of days. Furthermore, it was felt that there needed to be further awareness raising of the supports and training that is available and greater collaboration and communication between training and education providers and the private sector.

## 5.2 Employer Surveys

An online employer survey was produced and published on Kildare County Council's website for a period of eight weeks. The aim of the survey was to receive a cross-ector view from employers to build up a detailed picture of the employment landscape in County Kildare, understand key skills gaps and their causes. The survey garnered a total of 219 responses, during the 8-week consultation period. The survey adds to the findings of the feedback received from the other strands of the consultation, with broad alignment evident between the surveys, interviews and workshops. The sections on the next page provide a summary of findings from key questions including the profile of respondents (sector), information on skill shortages,

## 5.2.1 Profile of Respondents

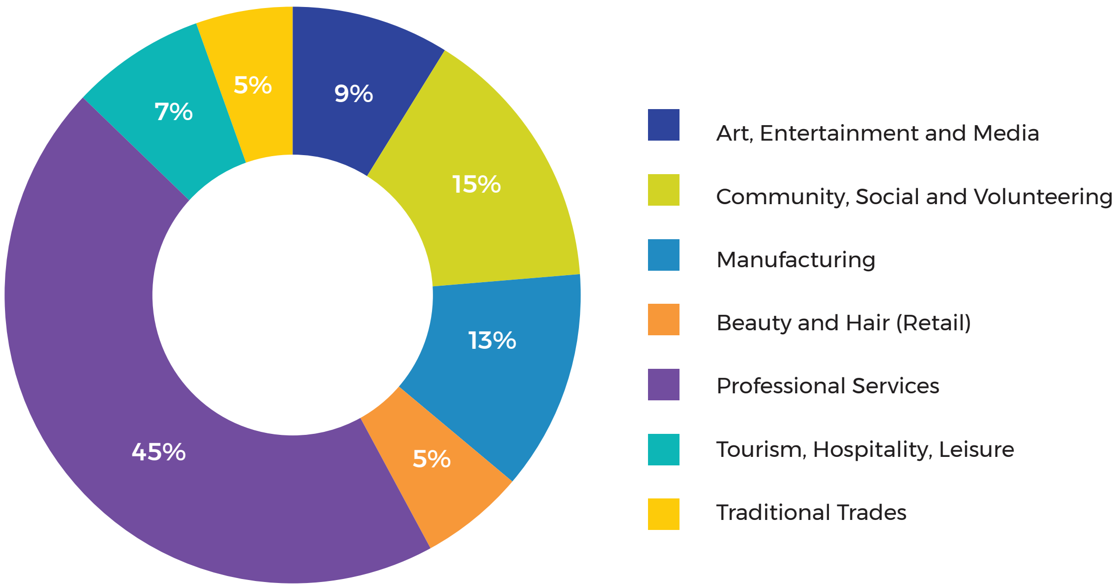
**Q2. In which sector does your company/organisation operate?**




- Of the respondents who answered the first question, excluding the "Other" category, the most represented sectors included those within the Tourism, Hospitality & Leisure sector (13%), Equine & Sports (8%) and Retail (7%)

- The "Other" category represented 30% of all responses (55 responses). Within this category was a variety of different sectors, a number of which were closely related to the above categories. A breakdown of the 'Other' sectors is provided below.

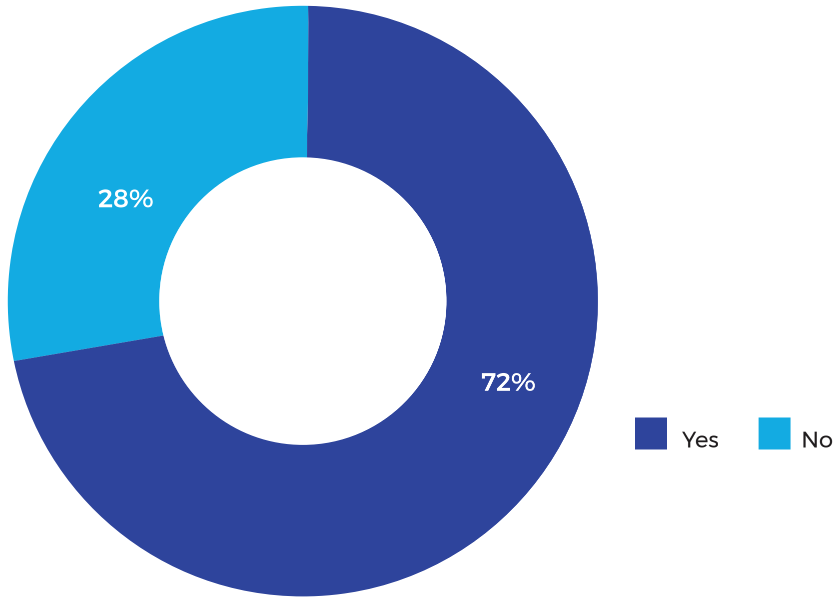
### Q2. (Answered Other) In which sector does your company/organisation operate?




- Professional Services (45%) was by far the most significant sector among respondents who categorised themselves as "Other". This included various consulting businesses, recruitment agencies, printers and other services.
- Community, Social and Volunteering related organisations and businesses represented 15% of the "Other" which included the likes of social enterprises, family support services and community development organisations.
- Manufacturing accounted for 13% of the "Other Category", while Tourism, Hospitality and Leisure represented 7% of total respondents and Traditional Trades and Beauty and Hair both accounted for 5% of respondents.

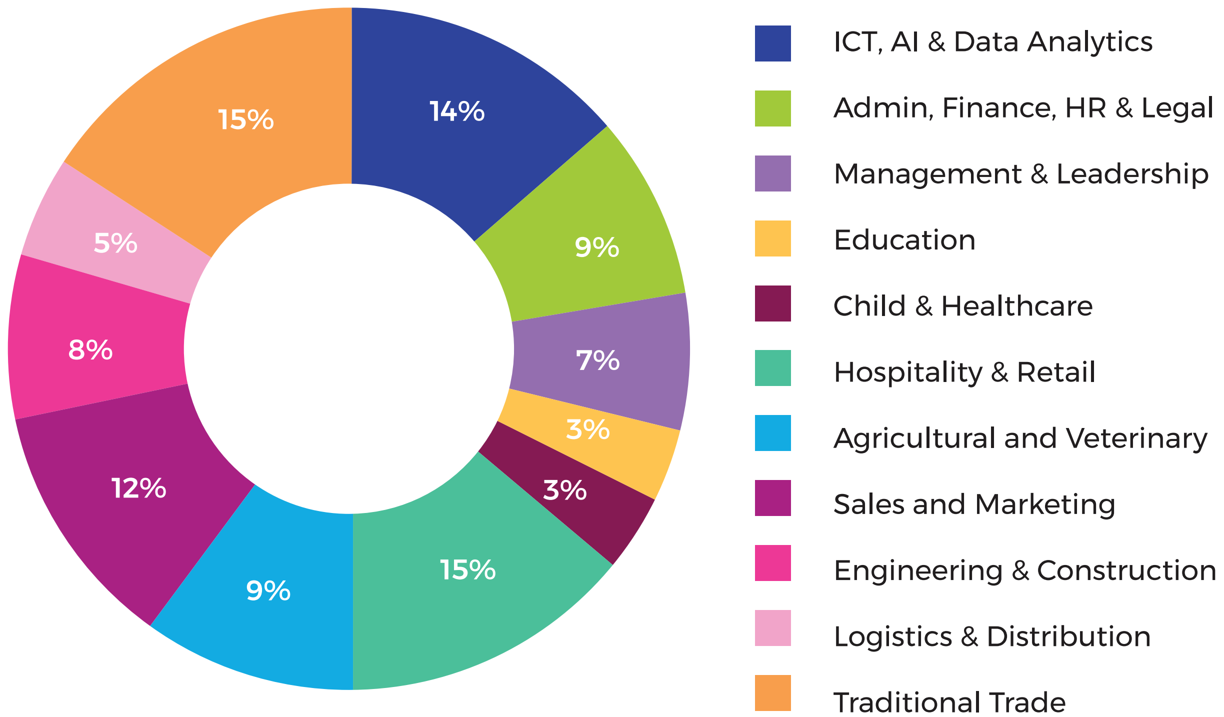
### 5.2.2 Skills Shortages and Development

**Q4. Within your existing workforce, are you currently experiencing any skills shortages?**



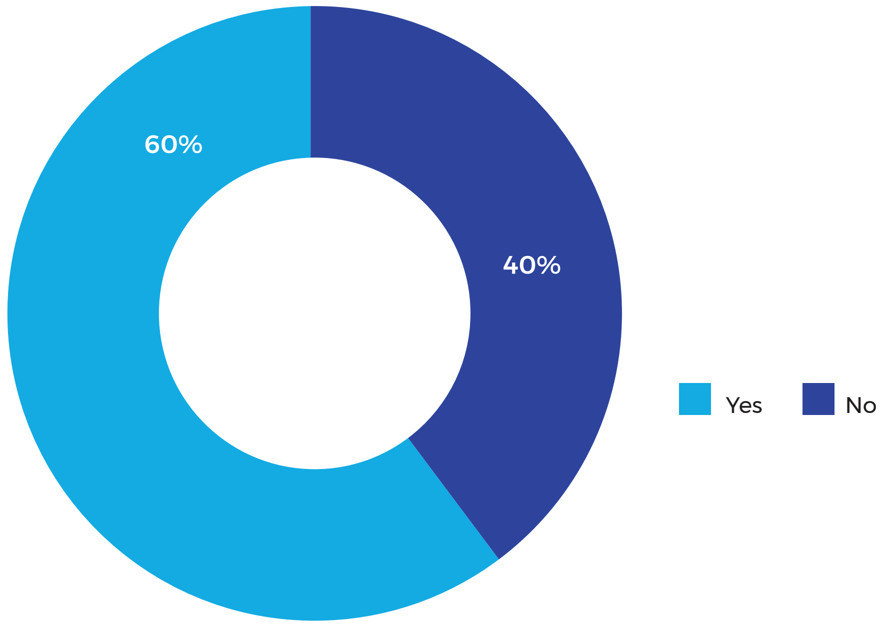

- When asked about skills shortages, 72% of respondents said they are currently experiencing skills shortages of some form.
- 28% of respondents to this question indicated they were not experiencing skills shortages.
- Further information below is provided below on the key skills shortages that respondents indicated they were experiencing.

**Q5. What specific skills are you currently lacking within your workforce or will require in the next 3 to 5 years?**



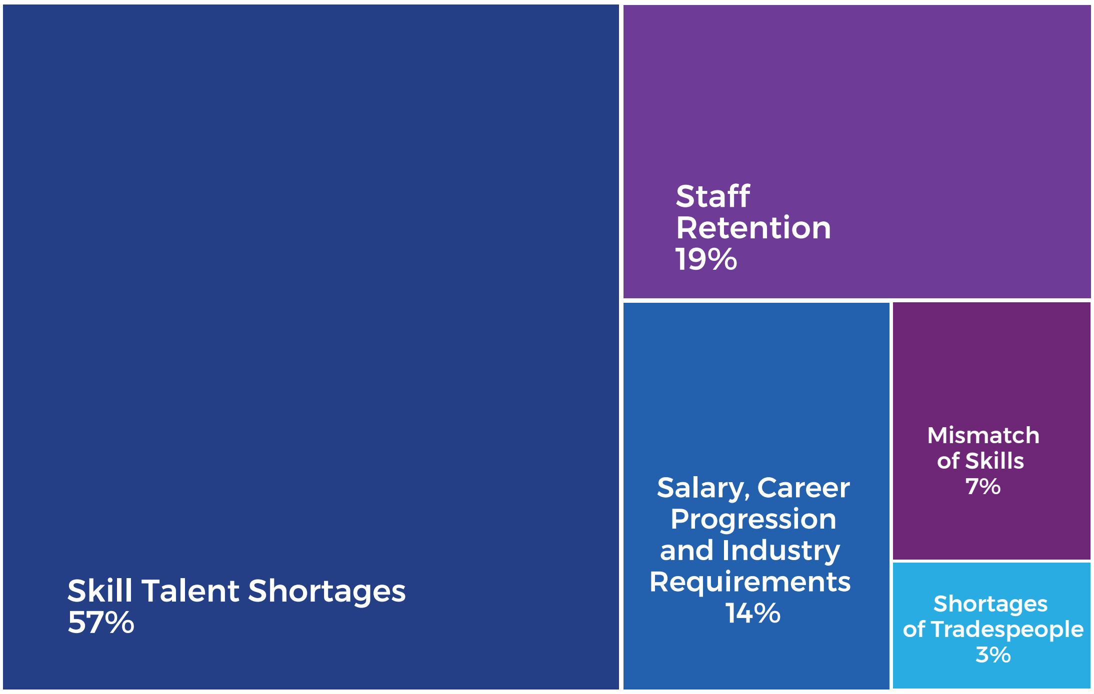

- Of respondents that are experiencing skill shortages, the two biggest areas of shortages were related to Traditional Trades (15%) and Hospitality and Retail (15%). This aligns with findings put forward from other strands of the consultation.
- The next largest area of shortages was ICT, AI & Data (14%), reflecting the findings from the wider consultation process that indicated cross sectoral demand for digital skills in various forms e.g., digital transformation in hospitality and retail and demand for data analytics skills in logistics and distribution.
- Sales and Marketing was also seen as another significant skills shortage (12%).

**Q6. Do you typically experience challenges to replace or retain personnel with key skills for your industry/sector?**



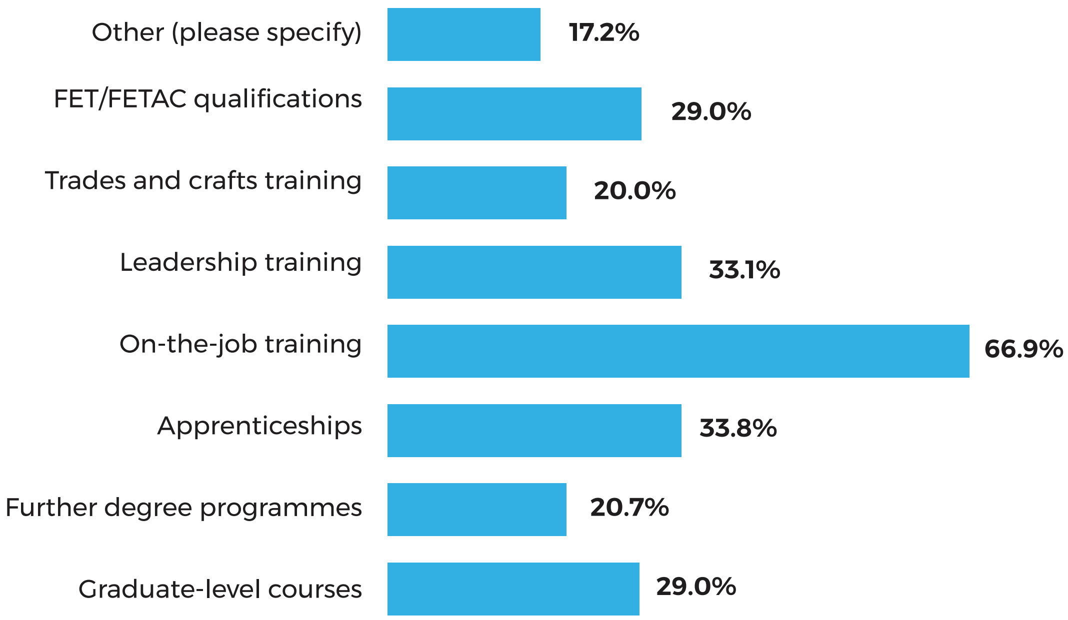

- In relation to the retention or replacement of staff, 60% of respondents experienced challenges in replacing or retaining staff with key skills.
- 40% of respondents did not experience challenges in this regard.
- Further information on the challenges faced is provided below

**Q7 Please elaborate below on the challenges experienced (e.g. lacking pipeline of talent suitable for your sector/company etc)**




- The key reason for respondents experiencing challenges in this area was due to what was perceived as Skills & Talent Shortages (57%). This included a number of reasons such as an inability to obtain qualified staff, limited availability of experienced staff and a limited pipeline of talent.
- Issues with staff retention was also seen as a significant challenge (19%) which was also reflected in the wider consultation. Similarly, 14% of respondents indicated challenges related to Salary (e.g., wage expectations), Career Progression, and Industry Requirements (e.g., physical/manual labour, working hours)
- Other challenges faced by respondents included a Mismatch of Skills (7%) and Shortages of Tradespeople (3%).

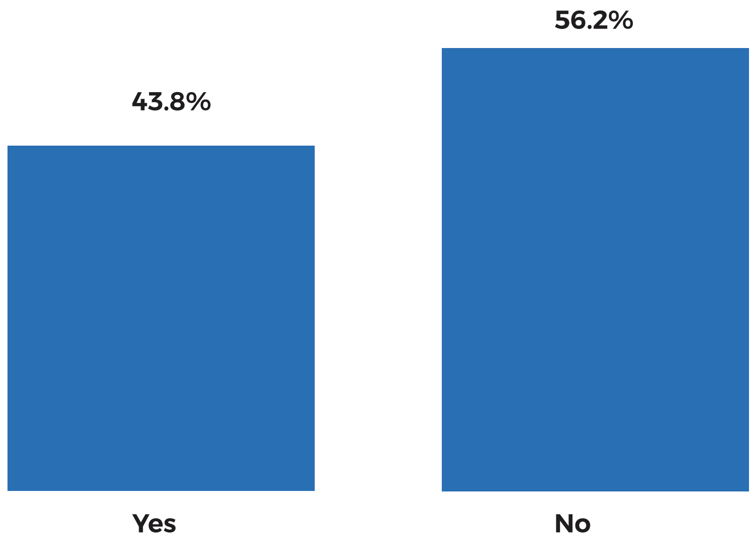
### Q8. What kind of training does your workforce require to address your skills needs?




- When asked about specific training needs for employers, 'On-the-job training' was outlined as the most important kind of training (66.9%). This may reflect the wider view put forward during the workshops and interviews that employers need short courses that can be conducted on-site without the staff having to leave their job for a number of days.

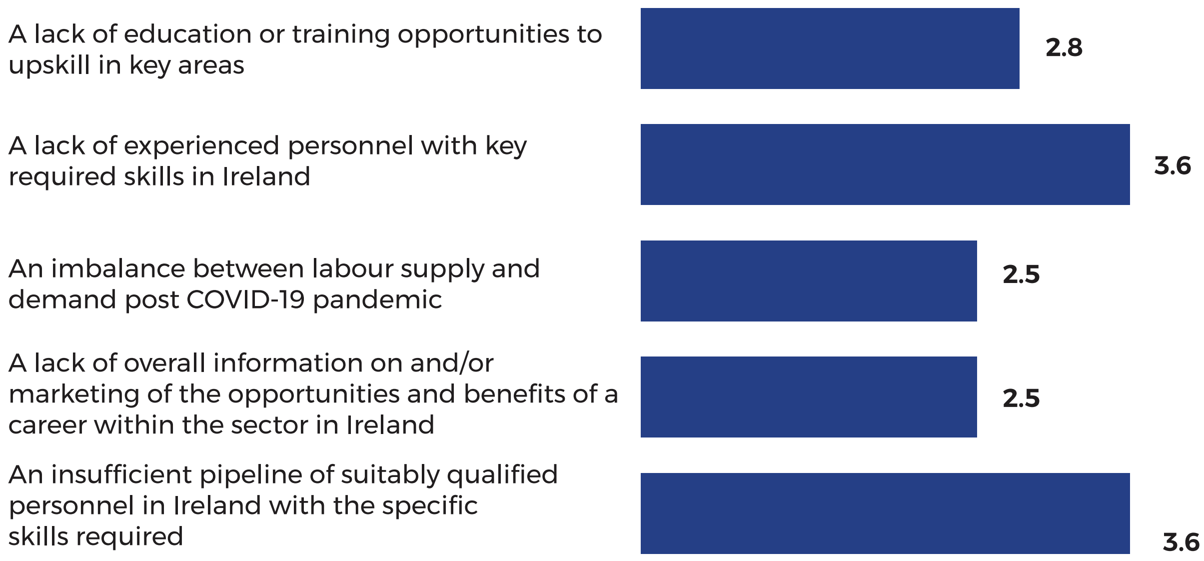
- Other kinds of training which were seen as important included 'Apprenticeships' (33.8%), 'Leadership training' (33.1%) and 'FET/FETAC qualifications' (29%). Again, this aligns with feedback provided during the interviews and workshops that suggested a need for further apprenticeships noting the shortages of tradespeople and a general need for leadership and managerial training across sectors.

**Q10. Do you currently have any skills-shortage vacancies advertised?**




- In relation to any live vacancies that were perceived to be in a role that is experiencing a skills shortage, 43.8% of respondents indicated that they currently had such vacancies open.
- 56.2% of respondents did have current vacancies related to skills shortages advertised. However, it is important to note that as the survey was conducted near the start of the summer holiday season, vacancies in the tourism, hospitality, leisure and retail sectors may have eased due to the availability of seasonal workers as indicated by participants in the interviews and workshops.
- Further information on what was believed to be contributing to some of these skills shortages is provided below.

### Q11. What factors do you feel are driving these skills shortages?

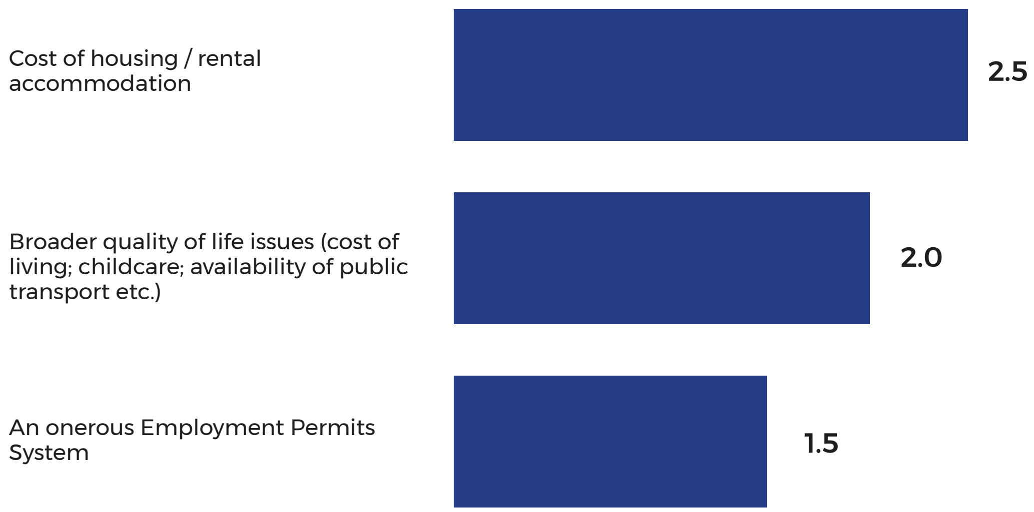



- When asked about the factors driving skills shortages in their organisations and in job vacancies advertised, respondents had to rank key factors by order of importance. Factors with a higher score can be seen to more significant contributors to skills shortages in relation to the perceptions of respondents.

- The most important factors identified by respondents included 'a lack of experienced personnel with key required skills in Ireland' and 'an insufficient pipeline of suitably qualified personnel in Ireland with the specific skills required', which both scored 3.6/5.

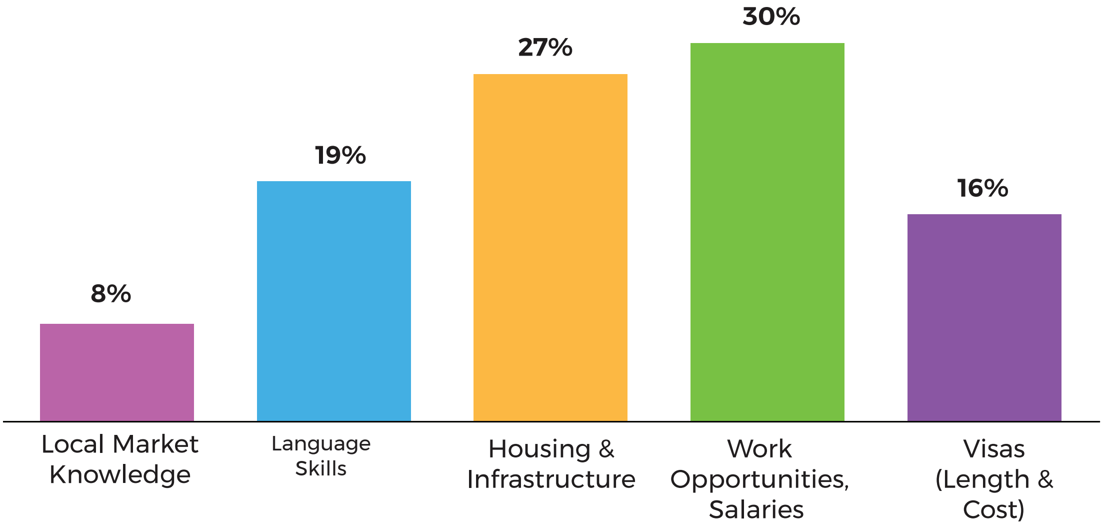
- Another key factor identified by respondents included 'a lack of education or training opportunities to upskill in key areas', which scored 2.8/5.

**Q13. What are the primary barriers to attracting key skills from abroad (including the return of Irish emigrants)?**




- When asked to rank the primary barriers to attracting skills from abroad (including the return of Irish people working from abroad) respondents had to rank key barriers by order of importance. Those with a higher score can be seen as more significant barriers to attracting skills from abroad.
- The cost of housing/rental accommodation was seen as the most significant barrier with a score of 2.5/5 followed by broader quality of life issues (including public transport) which scored 2.0/5. This was aligned with the wider consultation findings which highlighted issues with housing and public transport as key constraints,
- An onerous employment permits system was the lowest ranked of the barriers, indicating that this was not a key issue for many of the respondents.

**Q14. Are there any other barriers to attracting key skills from abroad?**

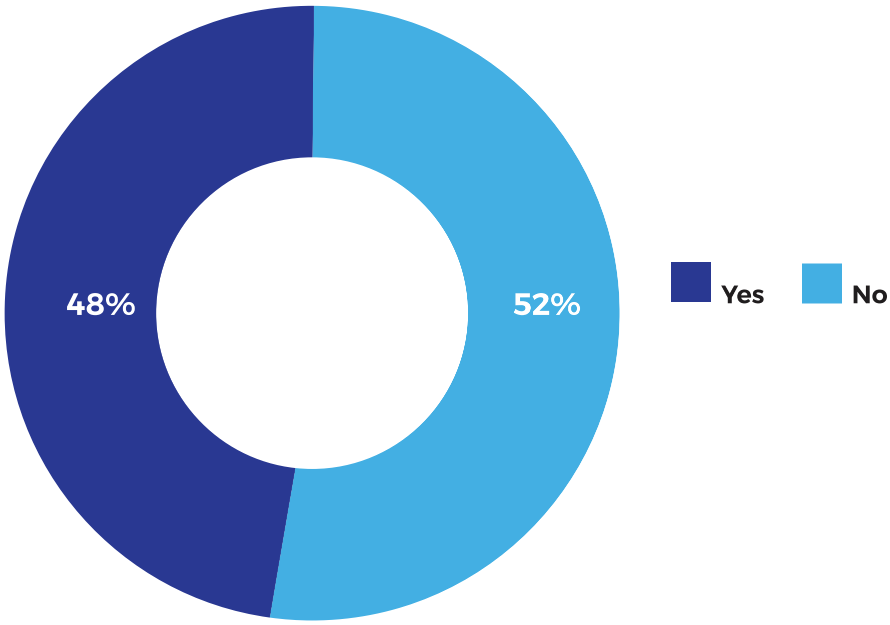



- In relation to other barriers to attracting key skills from abroad, the most significant barrier identified by espondents were issues relating to work opportunities, salaries & benefits, which accounted for 30% of the responses to this question. This aligns with findings from the wider consultation process that indicated issues around salary and benefit expectations.

- Unsurprisingly, housing & infrastructure was again highlighted as a significant barrier identified by respondents (27%) with the cost and availability of accommodation regularly cited.

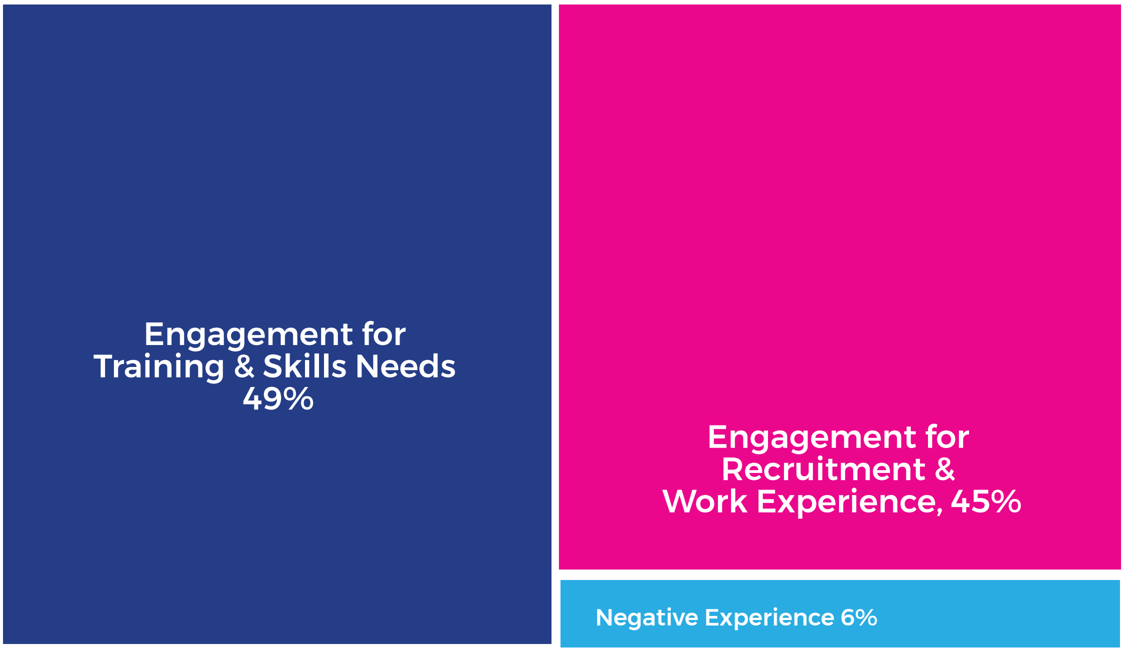
- Language Skills (19%) were also identified as a barrier as well as the length and cost of the visa process (16%) and local market knowledge (16%).

**Q18. Do you – or have you ever – engaged directly with a Higher Education Institute, other further education providers (FET), and/or Education and Training Boards in Ireland around meeting industry needs and/or addressing skills gaps or shortages?**




- When asked about engagement with education and training providers to assist with skills shortages, over half (52%) of all respondents had not engaged directly with an education or trainer provider to help address their skills gaps or shortages.
- The remaining 48% of respondents had engaged with education institutions. However, as suggested in the wider consultation, there is scope to increase the level of engagement between education and training providers and the private sector.
- In relation to those that had engaged with higher education authorities, further information is provided below on the nature of that engagement.

### Q19. Nature of engagements with Education and Training Providers




- When asked about the nature of their engagement with education and training providers, 49% of respondents engaged for the purposes of training and skills needs, such as course provision and development.
- A total of 45% conducted engagements for recruitment and work experience (e.g., recruiting graduates, interns and others).
- 6% of respondents had a negative experience when engaging with education and training providers with this usually relating to an inability to meet the specific course needs of the respondents.

# 6 SCOT Analysis

The SCOT analysis outlined below has been developed from the findings of the policy review, socio-economic profile, detailed analysis and consultation findings. **The Strengths, Challenges, Opportunities and Threats (SCOT)** outlines a summary of County Kildare's key strengths, constraints, opportunities and threats and has helped to inform the themes and actions in the recommendations chapter that follows. Key points from the SCOT analysis are as follows.

## STRENGTHS

- Growing and well-educated population with a youthful base
- Good variety of businesses and sectors present in the County including major multinational Companies
- Strong track record of attracting and retaining Foreign Direct Investment
- High and increasing labour force participation rate
- Transport infrastructure including road and rail, and easy access to transport corridors as well as Dublin Airport and port
- Pipeline of talent to support the Tech and ICT sector appears strong
- Entrepreneurial culture with a number of successful local businesses
- Notable sectoral strengths in the County relating to agriculture and food manufacturing, equine, retail and tech and ICT
- Good education infrastructure and provision including through Maynooth University
- Strategic and attractive location in proximity to Dublin
- Good supports available for businesses and entrepreneurs from the LEO

## CHALLENGES

- Cost and availability of accommodation and housing
- Issues with staff retention and skills shortages evident in many of the key sectors in the County including agriculture, equine, logistics and supply chains, tourism, hospitality, and retail, and construction
- Limited collaboration between the private sector, the Local Authority and education and training providers
- Uptake of training/upskilling limited in some sectors due to limited provision of on-site and/or remote training for the private sector
- Limited networks and networking opportunities or businesses in certain sectors such as logistics and distribution
- High commuting times and limited public transport across the County
- Ability to attract workers to the County due to competition from neighbouring locations on wages and benefits or informal or seasonal arrangements limit attractiveness to potential employees
- Notable shortage of tradespeople in the County
- Lack of awareness of existing provision and supports, and/or points of contact for training and education providers or other business networks
- Tourism potential not being fully realised

## OPPORTUNITIES

- Encourage and foster greater collaboration between the private sector and education and training providers
- Strengthen collaboration and coordination in the tourism sector to fully realise its potential
- Enhance public transport to support commuters and employers
- Raise further awareness of the career opportunities available in the County
- Ensure the private sector is aware of the supports and training provision that are available
- Explore innovative ideas to address the housing and accommodation crisis
- Further promote the County as a place to live and work
- Facilitate and encourage networking throughout the private sector
- Continue to attract a skilled workforce to the County and encourage people to enter the trades
- Attract further foreign direct investment to the County
- Build on available business supports and encourage entrepreneurs, start-ups and SMEs to establish themselves in the County
- Work with employers to ensure more formal policies, procedures and progression plans are in place were relevant

## THREATS

- High cost and limited availability of housing and accommodation may limit the attractiveness of County Kildare for investors and new businesses in the future
- Increased skills and staff shortages could lead to stagnation, decline or other issues in certain sectors
- Lack of understanding and awareness of the benefit and opportunities in key sectors could exacerbate skills shortages
- Rural decline evident in some towns and villages could lead to economic decline affecting the attractiveness of the County to potential investors and businesses
- Limited public transport may affect the ability of the County to attract commuters from neighbouring counties
- Insufficient collaboration between the private sector and education and training providers could lead to a mismatch between skills provision and skills need.
- Growing population will put pressure on existing essential services and infrastructure needed to support a skilled workforce
- Proximity to Dublin means that Kildare is losing a significant number of college age workers who are crucial to the Retail, Hospitality and Tourism sectors in the County.

# 7 Recommendations

**This chapter outlines the recommendations developed as part of the skills strategy. The recommendations have been developed from the findings of the socio-economic profile and sector analysis as well as from the views, feedback and ideas put forward during the consultation process. Similarly, they have also been informed by and are consistent with existing key strategies as outlined as part of the policy review in chapter 2.**

The recommendations have been designed to assist in addressing gaps and issues evident in the key sectors, support the continued supply of a skilled workforce and the development and future growth of the economy in County Kildare out to 2030. The recommendations cover the six key sectors, Agriculture & Food Manufacturing, Construction, Engineering & Energy, Equine & Sports, Logistics & Distribution, Tech & ICT and Tourism, Hospitality, Leisure & Retail. They also cover more general areas that will assist in supporting the future growth of the economy. The recommendations have been developed into four themes as follows:

- **Increasing Collaboration** – focused on increased collaboration between key stakeholders to ensure alignment and understanding of skills needs and education and training provision in the County. This includes enhanced collaboration between KCC, KWETB, Maynooth University, SETU, DSP, DoE, DFHERIS, the private sector, Kildare Chamber and other business representative bodies.

- **Promoting Opportunities –** focused around attracting and retaining a talented workforce to the County through promoting the many opportunities Kildare has to offer.

- **Skills Development and Sectoral Supports –** focused on the provision of information and supports to ensure the needs of key sectors in the County are being met.

- **Infrastructure and Services** – focused on ensuring that there is adequate infrastructure and services to support economic growth including in relation to space for businesses, transport and accommodation.

Each theme includes a number of actions that aim to support the six key sectors and County Kildare's economy out to 2030. A short description has been provided to add more context and rationale behind the overall theme before the actions are presented. For each action suggested enabling agencies and timeframes have been included. The timeframes are short term (1-2 years), medium term (3-4 years) and long term (5-6 years). The themes and actions are outlined in the pages that follow.

### 7.1 Theme 1 - Increasing Collaboration

Increasing collaboration between stakeholders from the public sector, private sector and education and training providers in County Kildare will be key to ensuring that the County has a strong pipeline of talent, with the right proportion of skills to support a growing economy. A collective and collaborative approach can assist in driving economic growth, enhancing the employability of the community and helping to ensure that the County remains a competitive and attractive location for investment. The research completed as part of the development of this strategy indicated a clear need for increased collaboration in the County. Actions under this theme will seek to foster a greater understanding of skills needs in the local economy, enhance knowledge sharing and innovative approaches to meet skills needs and increase the alignment of the provision of training and education with the needs of the private sector. The actions to achieve enhanced collaboration are as follows:

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 1 - Increasing Collaboration** | | | |
| **1** | Work with relevant stakeholders to re-launch the County Kildare Economic Forum as a vehicle to coordinate and drive economic development and enhance inter-sectoral knowledge sharing, including in relation to sectoral skills needs and workforce development. The forum should consist of public sector, private sector and education and training representatives and meet regularly (twice a year) | • Kildare Economic Forum re-launched<br>• No. of meetings of Kildare Economic Forum annually | ST | Cross-Sectoral |
| **2** | Continue to address the skills needs of the County through the implementation of actions of the County Kildare Local Economic and Community Plan 2023-2029 | • No. of skills actions progressed as part of the LECP | ST-MT-LT | Cross-Sectoral |
| **3** | Support and promote the new private sector engagement initiative in Maynooth University to increase collaboration and partnerships between the third level institution and local businesses | • No. of companies engaged by Maynooth University | ST-MT-LT | Cross-Sectoral |
| **4** | Establish key points of contact in education and training providers and encourage collaboration between training and education providers and the private sector to better align training programmes and the curriculum with the needs of employers. | • Key points of contact established and made available to relevant and interested parties | ST | Cross-Sectoral |

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 1 - Increasing Collaboration** | | | |
| **5** | Engage with key sectors in the County on a regular basis to ensure an up-to-date understanding of skills needs and the emergence of potential skills areas/positions for new employment in the County | • No. of engagements held with the private sector on skills needs<br>• No. of skills surveys conducted | ST-MT-LT | Cross-Sectoral |
| **6** | Explore opportunities to enhance participation in networking and engagement events in the County including through holding regular key sector themed networking and engagement events in in the County. While this includes all sectors a key area for enhanced networking was identified in Logistics and Distribution | • No. of overall networking events held<br>• No. of key sector themed networking events held | ST-MT-LT | Cross-Sectoral with enhanced need identified in Logistics & Distribution |
| **7** | Facilitate engagement between the equine sector, the Department of Education, the Department of Further and Higher Education, Research, Innovation and Science, and third level organisations to further understanding of the skills needs of the sector at the national level and how these needs can be addressed | • No. of overall networking events held<br>• No. of key sector themed networking events held | ST-MT-LT | Equine |
| **8** | Continue to support engagement between third level institutions and the tech & ICT sector to ensure that learning curriculums are aligned with the wide needs of the sector | • Engagement facilitated through the re-launched economic forum | ST-MT-LT | Tech & ICT |

### 7.2 Theme 2 - Promoting Opportunities

County Kildare, with its strategic location, vibrant business community and diverse array of sectors, has much to offer in terms of career opportunities and professional development. Furthermore, the County offers a high quality of life with a number of growing and well serviced towns and villages and excellent schools, retail and recreational amenities. When these opportunities and benefits are viewed together, it is clear that Kildare is an ideal place to live, work and grow.

Yet further understanding and awareness of the County's key sectors and opportunities is needed. This will be achieved through a number of actions that will seek to promote the County as a place to work, live and visit. Furthermore, it will include initiatives that will seek to increase understanding of and interest in the key sectors in the County and the wide variety of roles and opportunities that exist. It will also seek to enhance awareness of training and development opportunities and resources. The actions that will help to promote awareness and understanding of the sectors and opportunities that exist, are as follows:

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 2 - Promoting Opportunities** | | | |
| **9** | Conduct a coordinated and targeted marketing campaign to attract people with in demand skills to live and work in County Kildare highlighting the career opportunities that exist including in the County's key sector | • Marketing campaign conducted | ST-MT | Cross-Sectoral |
| **10** | Continue to support early engagement initiatives at in schools and universities that highlight the careers available in key sectors in the County | • No. of early engagement initiativs supported by sector | ST-MT-LT | Cross-Sectoral |
| **11** | Hold a careers fair in collaboration with representatives from the key sectors to raise awareness of career opportunities in the County, including for commuters, and to connect employers with potential employees. | • No. of attendees at careers fair<br>• No of companies in attendance<br>• No. of opportunities available and filled<br>• Careers Fair held | ST | Cross-Sectoral |
| **12** | To help address the cross-sectoral gap in knowledge and skills, work with relevant stakeholders to raise awareness of opportunities relating to the green economy and sustainability at all levels from school leavers through to adult education. | • No. of initiatives held to raise awareness of career opportunities relating to sustainability and the Green economy | ST-MT | Cross-Sectoral |
| **13** | Raise awareness of the Skills to Advance initiative to equip businesses and employees with the skills they need to progress in their current roles or to adapt to the changing job market and new job opportunities. | • No. of individuals completing Skills to Advance courses | ST-MT-LT | Cross-Sectoral |

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 2 - Promoting Opportunitien** | | | |
| **14** | Develop and maintain a database of available educational and training courses, including micro-credentials and micro-qualifications, in the County and circulate to relevant networks. | • Database of available courses | ST-MT-LT | Cross-Sectoral |
| **15** | Raise awareness of the opportunities in the agricultural and food manufacturing sector. | • Opportunities in the agricultural & food manufacturing sector promoted | ST-MT-LT | • Agriculture & Food Manufacturing |
| **16** | Promote and raise awareness of available apprenticeships in the traditional trades as well as the green economy (renewables, retrofitting etc), highlighting the high level of demand and need in the County across a number of sectors including construction, engineering, tech, logistics and food manufacturing. | • No. of engagement sessions held<br>• Apprenticeships promoted via relevant networks | ST-MT-LT | • Construction, Engineering & Energy<br>• Tech & IT<br>• Agriculture & Food Manufacturing<br>• Logistic & Distribution |
| **17** | Progress the relevant initiatives in the Thoroughbred Country Destination Experience Development Plan to drive tourism and further understanding of the equine sector in the County and nationally. | • No. of initiatives progressed as part of the Thoroughbred Country Destination Experience Development Plan | ST-MT | • Equine<br>• Tourism, Hospitality, Leisure & Retail |
| **18** | Review and identify relevant national skills groups and associated initiatives to promote career opportunities that can be leveraged to address skills needs in County Kildare. This could include the national annual logistics and supply chains skills week and the Feed Ireland's Future campaign. | • National initiatives identified and promoted in County Kildare | ST-MT-LT | • Logistics & Distribution<br>• Agriculture & Food Manufacturing |

## 7.3 Theme 3 - Skills Development and Sectoral Supports

Kildare has a diverse economy with an array of successful local and multinational businesses operating in the County. As outlined in the previous sections, the many sectors in the County have a diverse range of needs, particularly in relation to skills development and talent attraction. As the economy continues to grow and markets and technology evolve, it will be vital that both businesses and the workforce are provided with the necessary supports to remain competitive and meet the needs of the growing economy. Therefore, the actions under this theme will be focused on fostering skills development and providing robust sector supports, particularly in relation to key areas that have been highlighted from the analysis.

This will include promoting upskilling and lifelong learning amongst both employers and the workforce in relation to skills that will be vital for the key sectors in the County. In doing so, it is hoped that the community will be well prepare for the jobs of the future and that employers will have access to the skills that they require. Furthermore, supports for businesses under this theme will seek to address key issues relating to the attraction and retention of workers in Kildare. The actions under this theme are as follows:

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 3 - Skills Development and Sectoral Supports** | | | |
| **19** | Provide and promote supports and training on digital skills and the adoption of digital technology across all sectors in the County | • No. of businesses availing of digital supports<br>• No. of businesses availing of managerial skills training | ST-MT-LT | Cross-Sectoral |
| **20** | Ensure that companies are aware of sustainability reporting requirements relating to the EU's Corporate Sustainability Reporting Directive and signpost them to relevant supports and training where appropriate | • Session(s) on requirements | ST | Cross-Sectoral |
| **21** | Continue to organise workshops and other sessions to brief businesses on the transition to greener and more sustainable practices, the supports that are available and the benefits of adopting more sustainable practices | • No. of sessions held on sustainability and the green transition | ST-MT-LT | Cross-Sectoral |
| **22** | Engage with relevant groups to identify the skill set of refugees currently housed in County Kildare and communicate opportunities and supports to allow employers to access this workforce | • Skill sets identified and information on supports circulated to relevant groups | ST | Cross-Sectoral |
| **23** | Engage with education and training providers to highlight the demand for on business premises and/or remote based learning/training particularly in relation to the tourism, hospitality and retail sectors, and encourage the development of enhanced levels of on-site or remote based training | • Demand for remote and/or on premises training/learning high lighted to education and training providers | ST-MT | Cross-Sectoral with enhanced need identified in Tourism, Hospitality, Leisure & Retail |

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 3 - Skills Development and Sectoral Supports** | | | |
| **24** | Open the Regional Food Innovation and Skills Hub (2025) and continue to promote skills and educational development in the sector | • Regional Food Innovation and Skills Hub opened | ST | Agriculture & Food Manufacturing |
| **25** | Work with relevant sector representatives and education and training providers to explore supports and training options to introduce more formalised employment policies in sectors where neeeded, | • Options identified | ST-MT | Cross-Sectoral with enhanced need identified Agriculture & Food Manufacturing, Equine and Tourism, Hospitality, Leisure & Retail |
| **26** | Work with education and training providers to assess the provision and potential for expansion of apprenticeships in the traditional trades as well as in areas of future demand such as around the maintenance of electric vehicles | • No. of apprenticeships available in the County<br>• Provision identified and options explored | ST-MT | • Construction, Engineering & Energy<br>• Agriculture & Food Manufacturing<br>• Tech & ICT<br>• Logistics & Distribution |
| **27** | Work with relevant stakeholders to encourage the uptake of new techniques and methods in the construction sector including in relation to both digital technologies and new more sustainable methods | • No. of individuals completing relevant course | ST-MT | Construction, Engineering & Energy |
| **28** | Promote and provide supports and training around the development of managerial and soft skills, including communication skills, and raise awareness of the offering in key sectors | • No. of companies availing of managerial skills training<br>• No. of companies availing of soft skills training | ST-MT-LT | • Construction, Engineering & Energy<br>• Tech & ICT,<br>• Logistics & Distribution<br>• Tourism, Hospitality, Leisure & Retai |
| **29** | Work with elected representatives to highlight the visa issues and associated staff shortages the equine sector is facing in some roles due to required staff being classed as unskilled labour for visas purposes | • Issue highlighted with elected representatives | ST | • Equine |

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 3 - Skills Development and Sectoral Supports** | | | |
| **30** | Work with relevant sector representatives and education and training providers to explore options to increase health and safety in the equine sector and the uptake of relevant training | • Options identified and uptake in relevant training increased | ST-MT | Equine |
| **31** | Review the provision of logistics and supply chain courses (including in relation to data analytics) in the County and assess the demand and options to enhance provision | • Review completed | ST | Logistics & Distribution |
| **32** | Encourage the uptake of the SMART Driving training programme in support of reduced emissions in relation to Logistics and Distribution | • No. of individuals completing SMART Driving Training programme | ST-MT-LT | Logistics & Distribution |
| **33** | Explore options with relevant stakeholders to ensure that training provision and apprenticeships provided by Solas/the KWETB for the tech & ICT sector remains relevant and aligned with sector needs | • Options to enhance alignment identified | ST | Tech & ICT |
| **34** | Work with education and training providers to explore the need and options for potential supports to re-skill and/or upskill individuals that may have been made redundant from niche and narrowly focussed roles in the tech & ICT sector that could benefit from more generalised skills and knowledge to aid employability | • Need and options assessed | ST | Tech & ICT |
| **35** | Continue to support Fáilte Ireland's employer excellence programme for those businesses working in the tourism and hospitality sector and encourage companies to engage | • No. of employers in Kildare completing employer excellence programme | ST-MT-LT | Tourism, Hospitality, Leisure & Retail |
| **36** | Continue to provide supports and upskilling opportunities for the retail sector, including through the Retail Series, and explore options for enhanced training on employer excellence that could assist with the attraction and retention of workers to the sector | • No. of companies availing of retail supports<br>• Options for employer excellence programme explored | ST-MT-LT | Tourism, Hospitality, Leisure & Retail |

## 7.4 Theme 4 – Infrastructure and Services

The importance of infrastructure in relation to supporting the growth of the economy in Kildare cannot be overstated. This is particularly the case in relation to accommodation and transport, with employees needing to be able to secure accommodation in the County and/or have the ability to travel to their place of work. As such, the development of this Skills Strategy and the associated actions relating to the development and attraction of a skilled workforce, must take into consideration the supporting infrastructure that can enable this to happen.

County Kildare, like many counties across the country, is facing issues in relation to the availability of appropriate and affordable accommodation and housing. Similarly, despite linkages via road and rail, public transport across the wider County is limited. As noted in the consultation section above, both of these issues were highlighted repeatedly as constraints to attracting, securing and retaining staff with the necessary skills to the County. As such, actions under this theme will seek to address these issues as well as exploring other infrastructure requirements that could support the economy. The actions under this theme are as follows:

| No. | Theme | KPI | Timeframe Relevance | Key Sector |
|---|---|---|---|---|
| | **Theme 4 – Infrastructure and Services** | | | |
| **37** | Work with the NTA, the private sector, and other relevant stakeholders to explore options on how public transport can be improved to better meet the needs of both employers and employees | • Improvements to public transport identified and progressed where appropriate | MT-LT | Cross-Sectoral |
| **38** | Through the Economic Forum explore innovative ideas on how accommodation challenges can be addressed to help support business needs | • Ideas identified through Economic Forum | ST- MT | Cross-Sectoral |
| **39** | Continue to assess the availability and demand for different types of space for businesses in the County, including start-ups, and ensure an adequate level of zoning to support economic growth | • Adequate commercial space available | ST-MT-LT | Cross-Sectoral |
| **40** | Continue to support the development of active travel infrastructure in the County to support travel to work through cycling and walking | • KM of cycle paths in the County | ST-MT-LT | Cross-Sectoral |

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Reference Style: Author's First Name Last Name, Title (Journal/Website: Publisher, Year), Page Number (if applicable).

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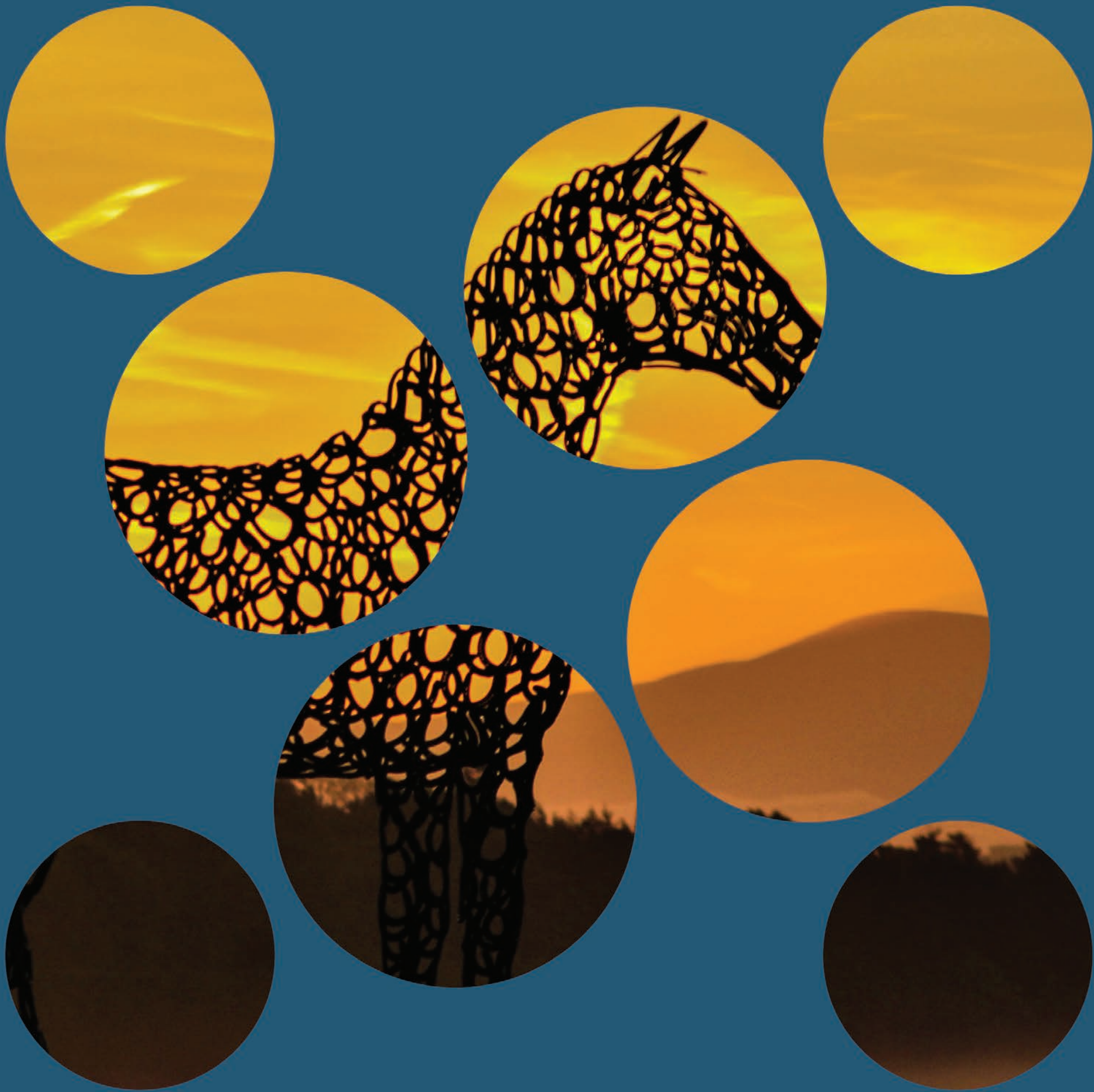
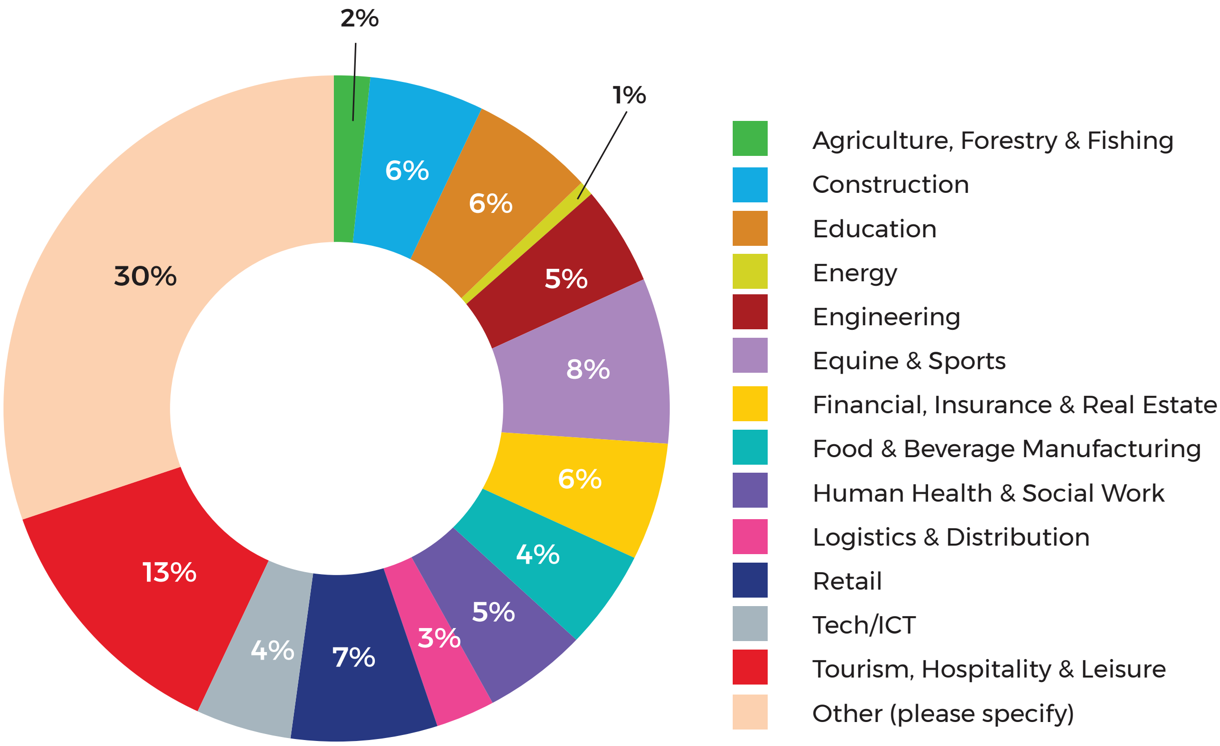


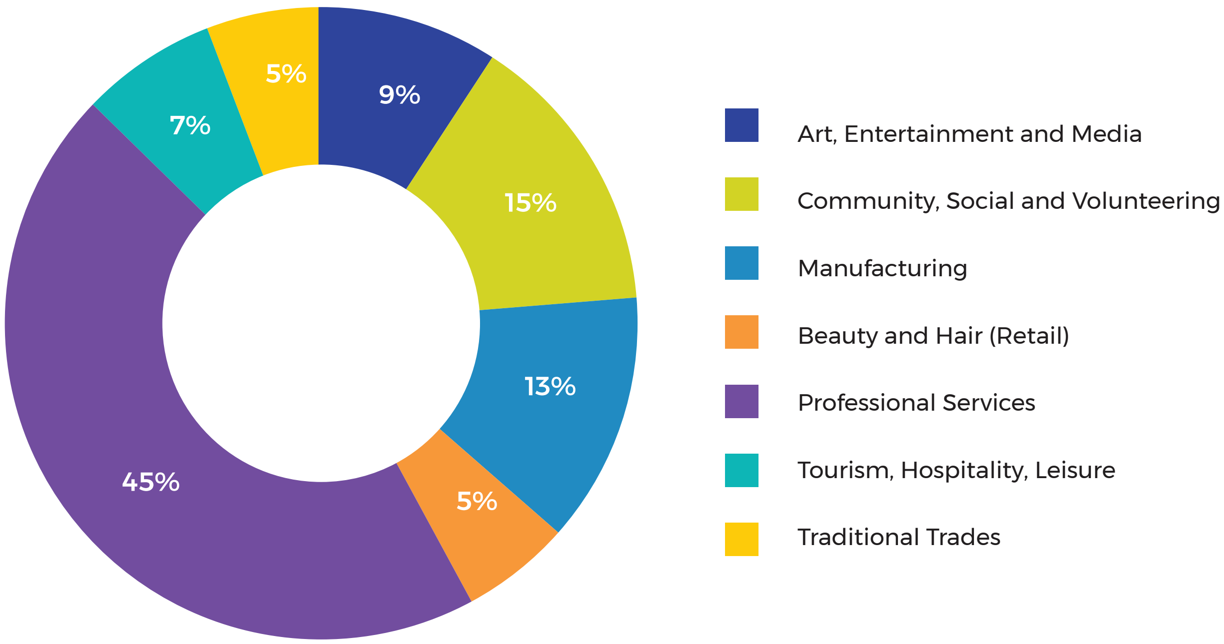
# 9 Appendices A

## A.1.1 Business Survey Charts

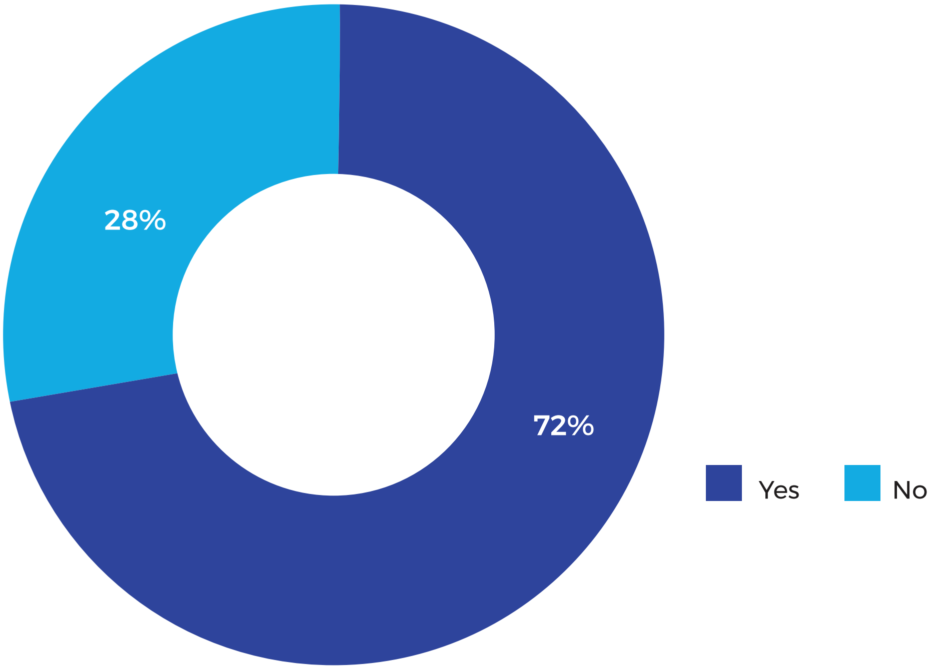
Q2. In which sector does your company/organisation operate?



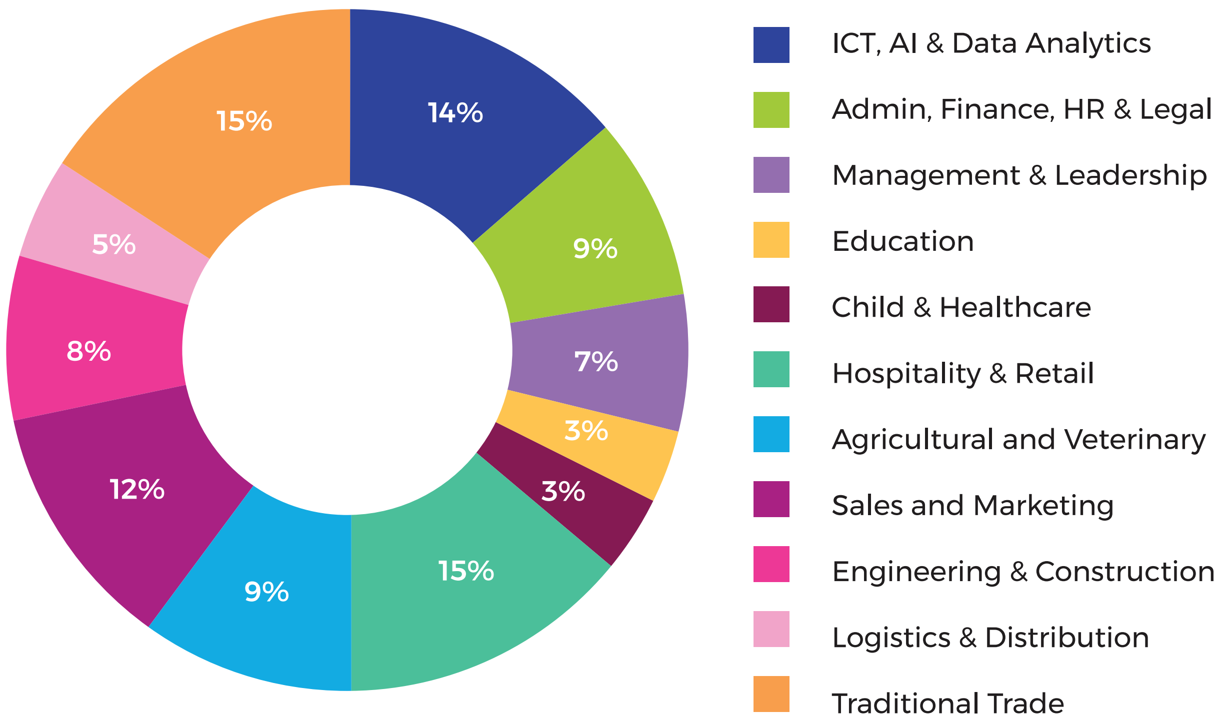
**Q2. (Answered Other) In which sector does your company /organisation operate?**



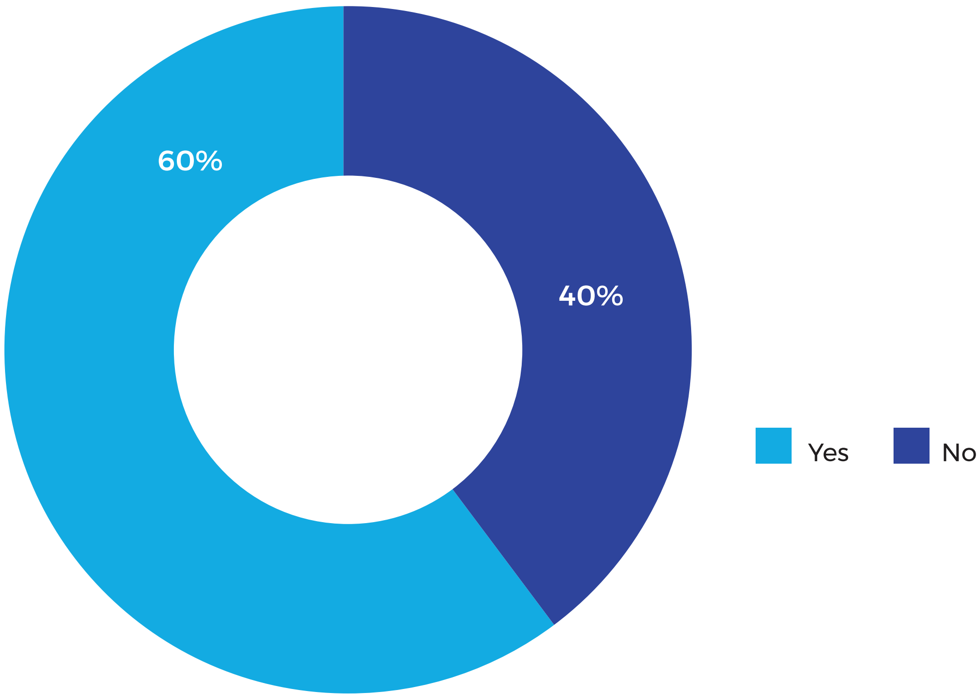
**Q4 Within your existing workforce, are you currently experiencing any skills shortages?**



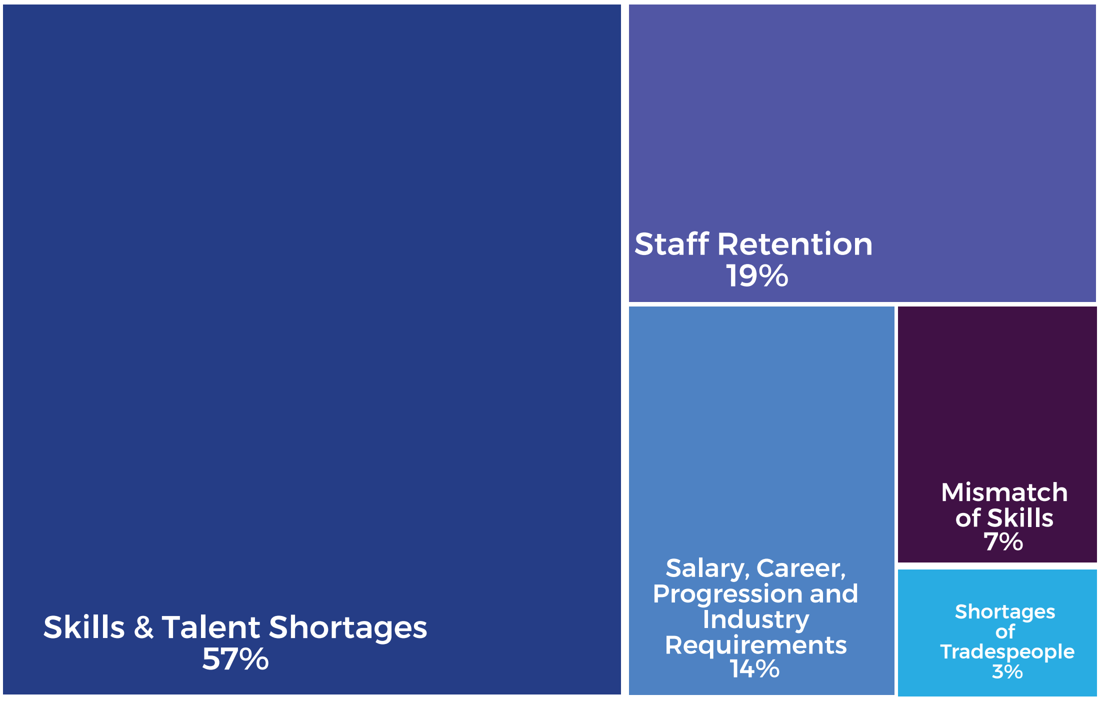
**Q5. What specific skills are you currently lacking within your workforce or will require in the next 3 to 5 years?**



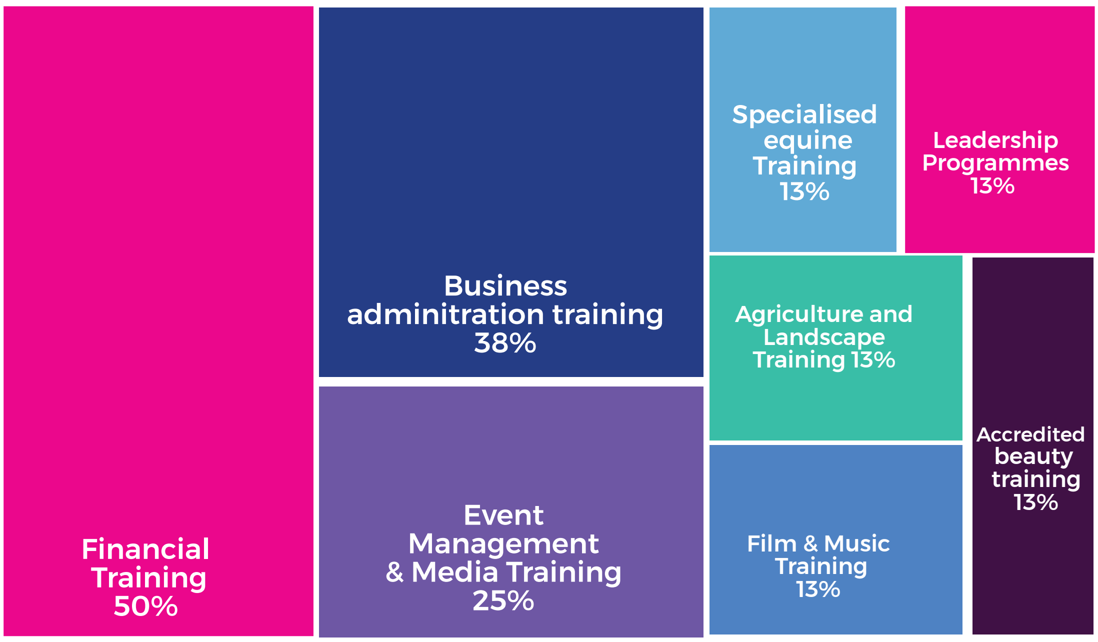
**Q6. Do you typically experience challenges to replace or retain personnel with key skills for your industry/sector?**



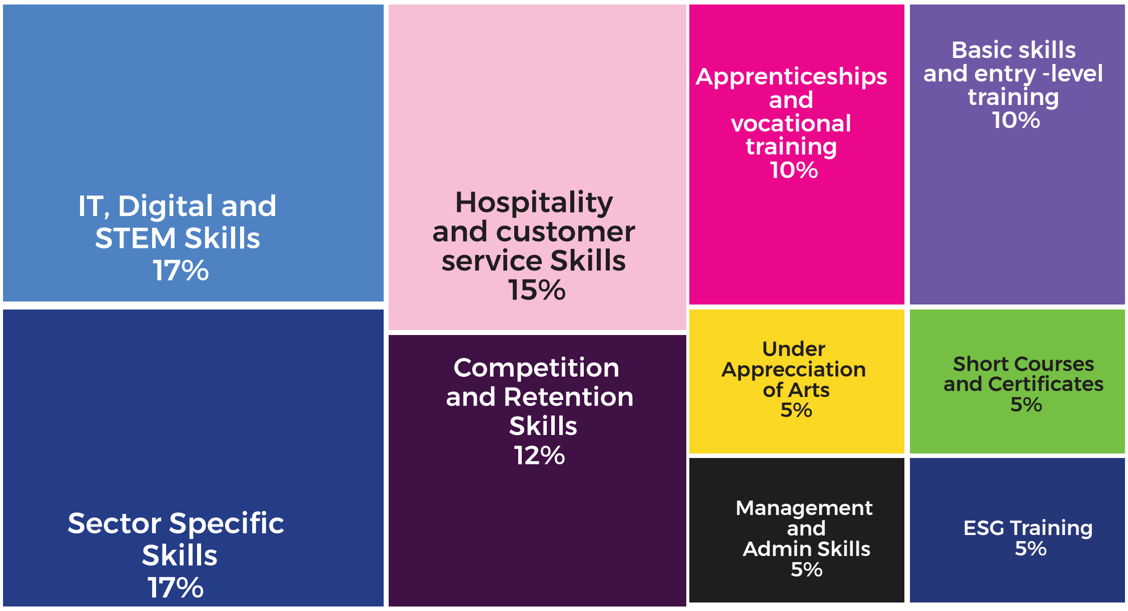
**Q7 Please elaborate below on the challenges experienced (e.g. lacking pipeline of talent suitable for your sector/company etc.)**



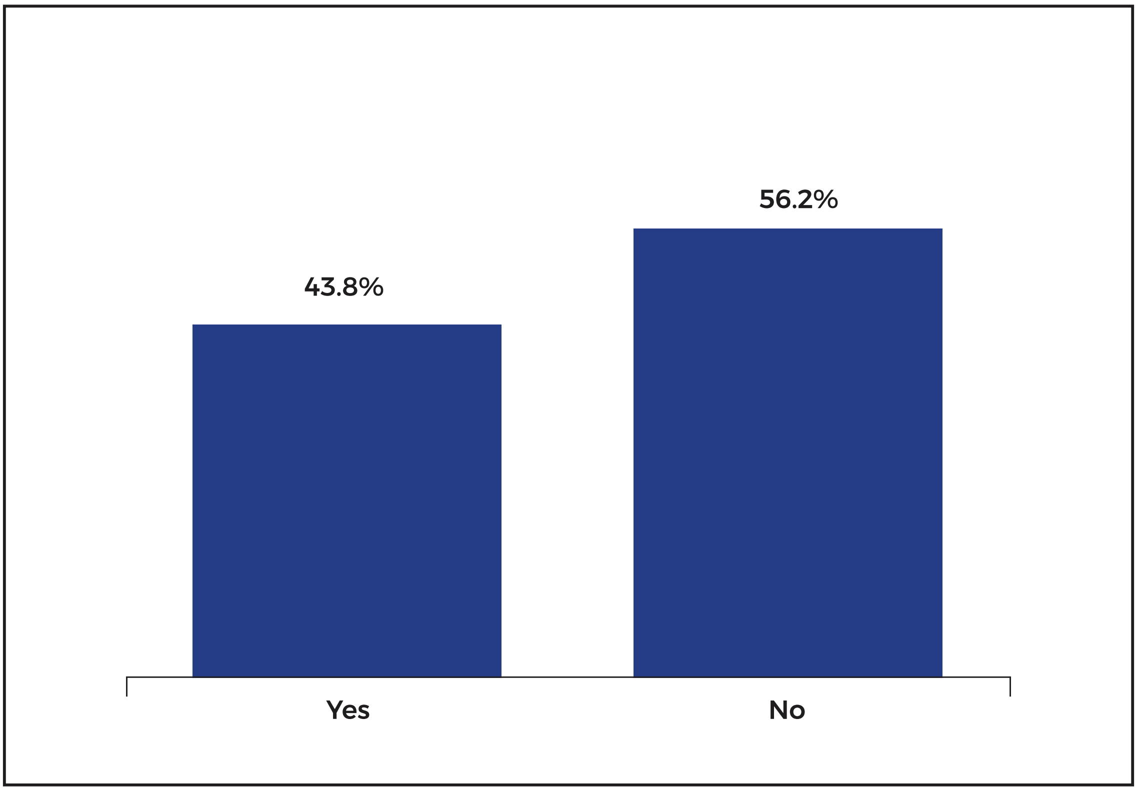

**Q8. (Answered Other) What kind of training does your workforce require to address your skills need?**



Q9. If You would like to provide further details on where these gaps are felt more sharply, pleasse do so in the space below.

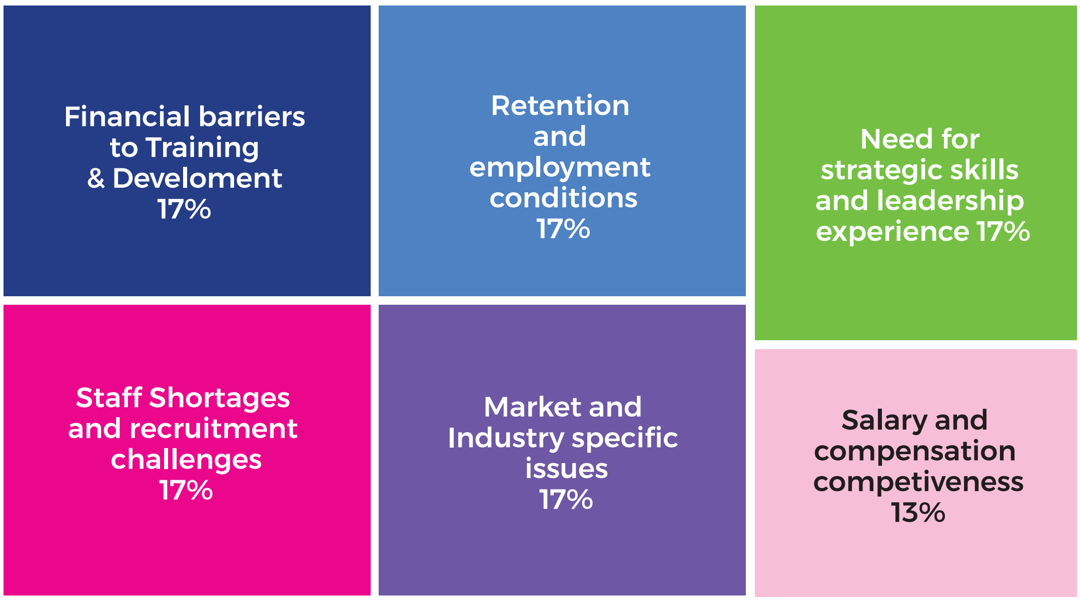



Q10. Do you currently have any skills-shorages and vacancies advertisied?

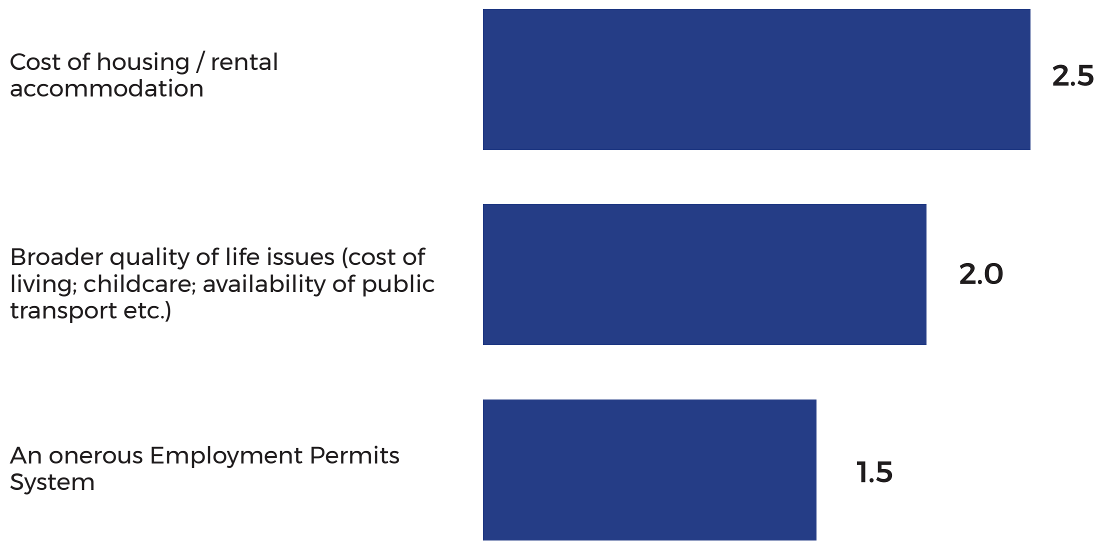


### Q11. What factors do you feel are driving these skills shortages?

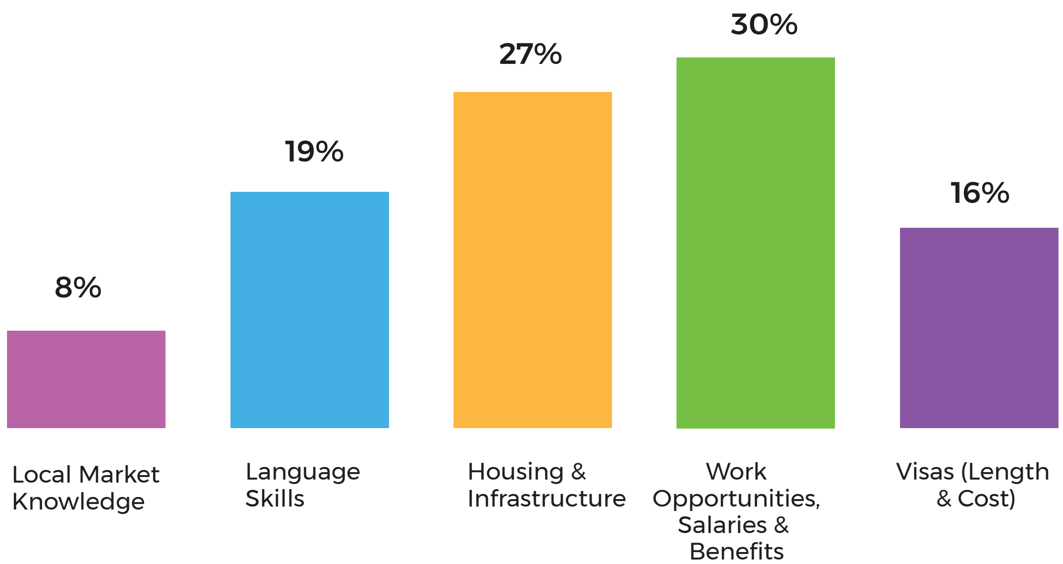

### Q12. If you would like to comment or elaborate on the skills shortages you are experencing, please do so in the text box below.

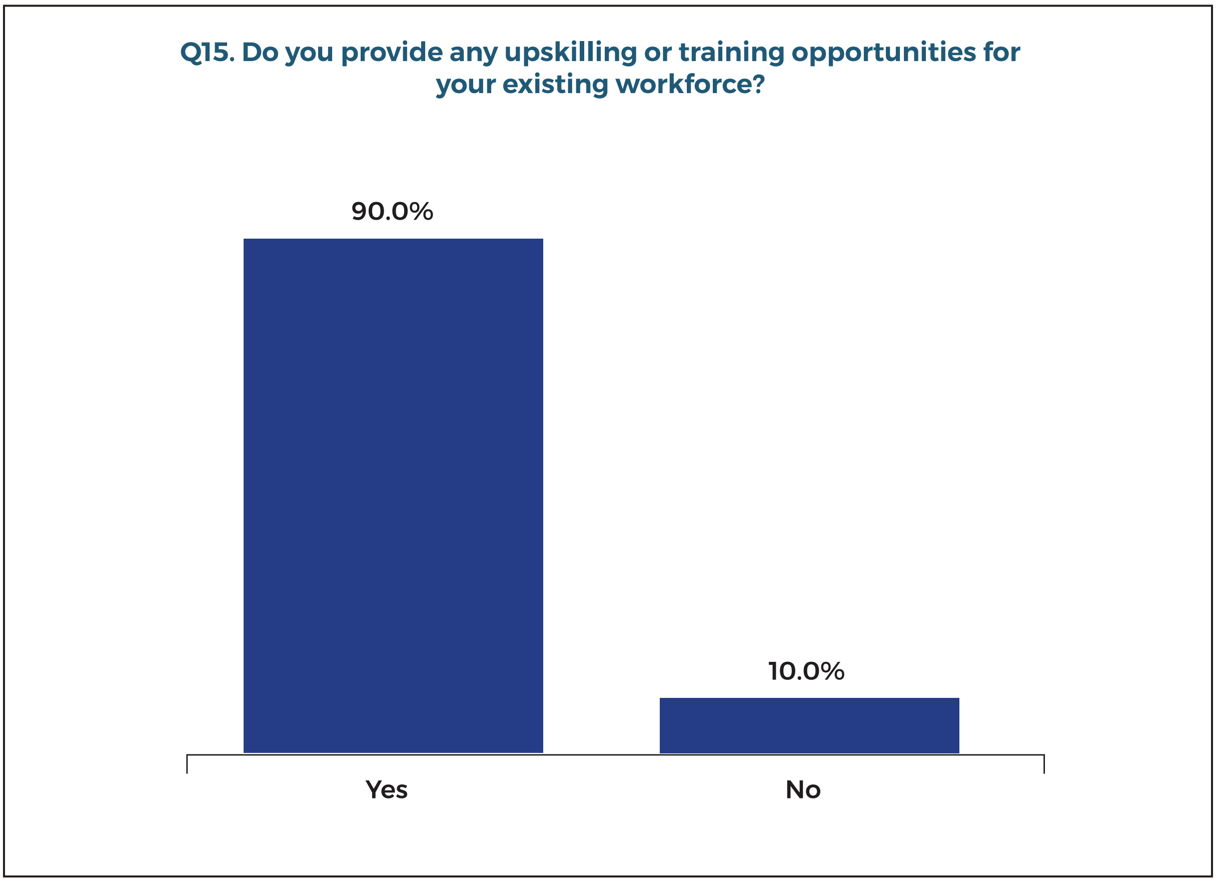


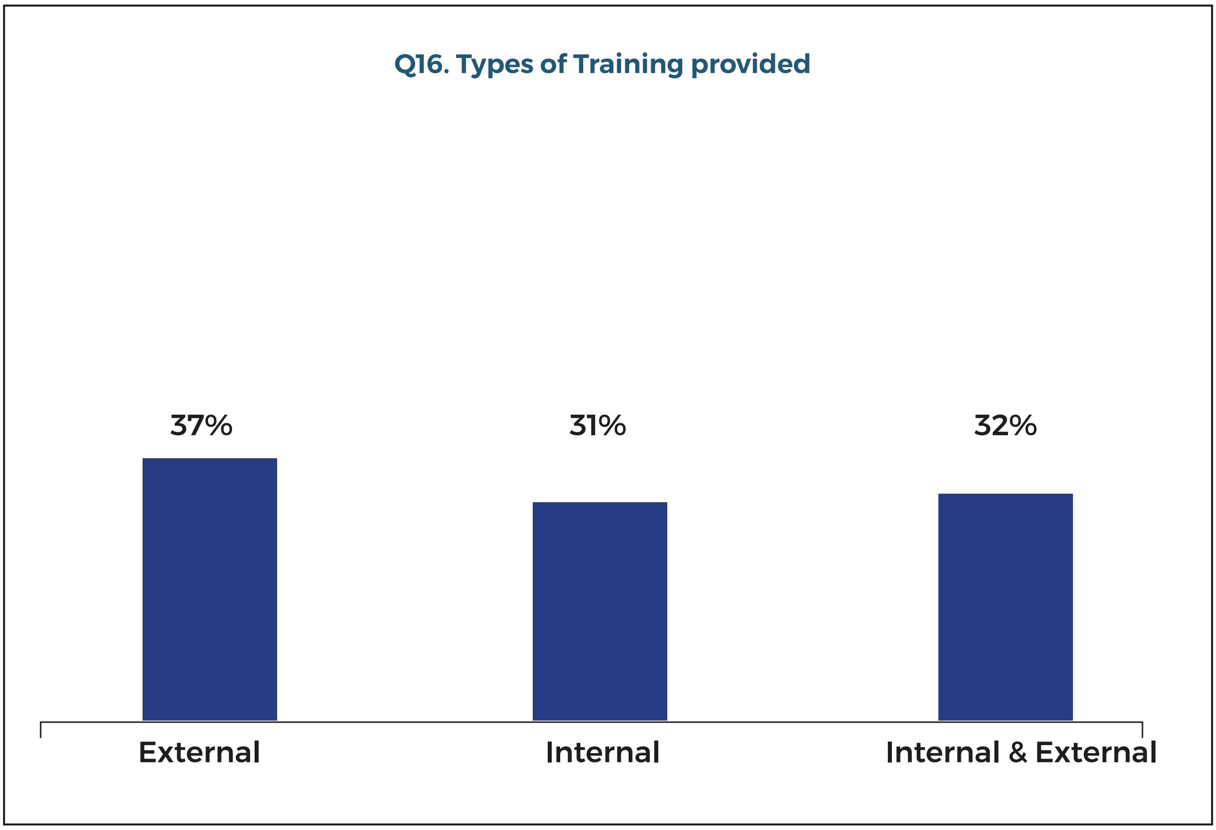
**Q13. What are the primary barriers to attracting key skills from abroad (including the return of Irish emigrants)?**

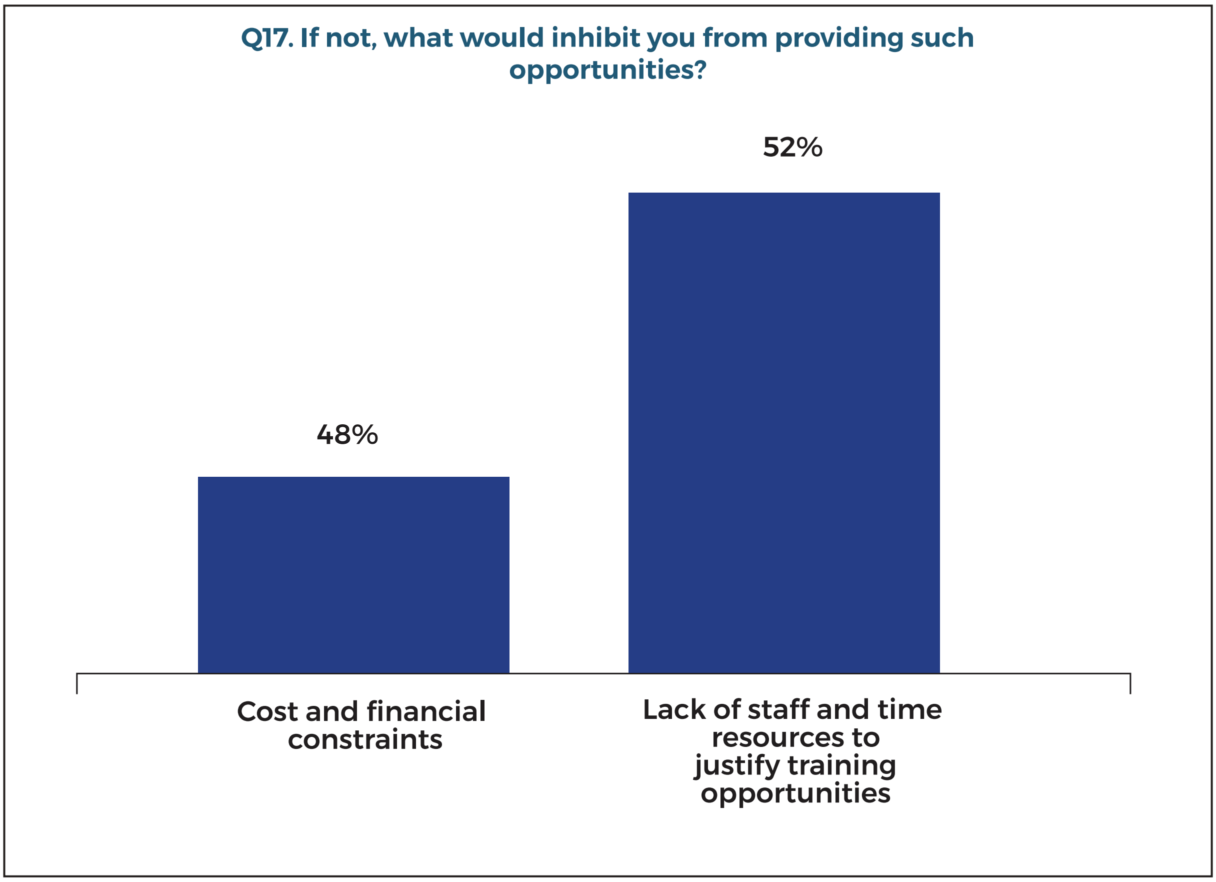



**Q14. Are there any other barriers to attracting key skills from abroad?**

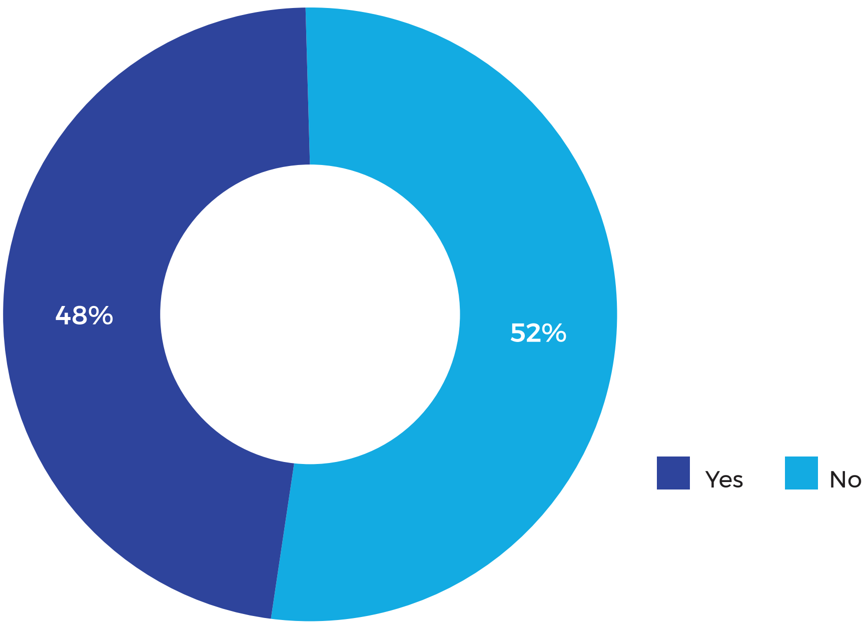



Q15. Do you provide any upskilling or training opportunities for your existing workforce?
90.0%
10.0%
Yes
No

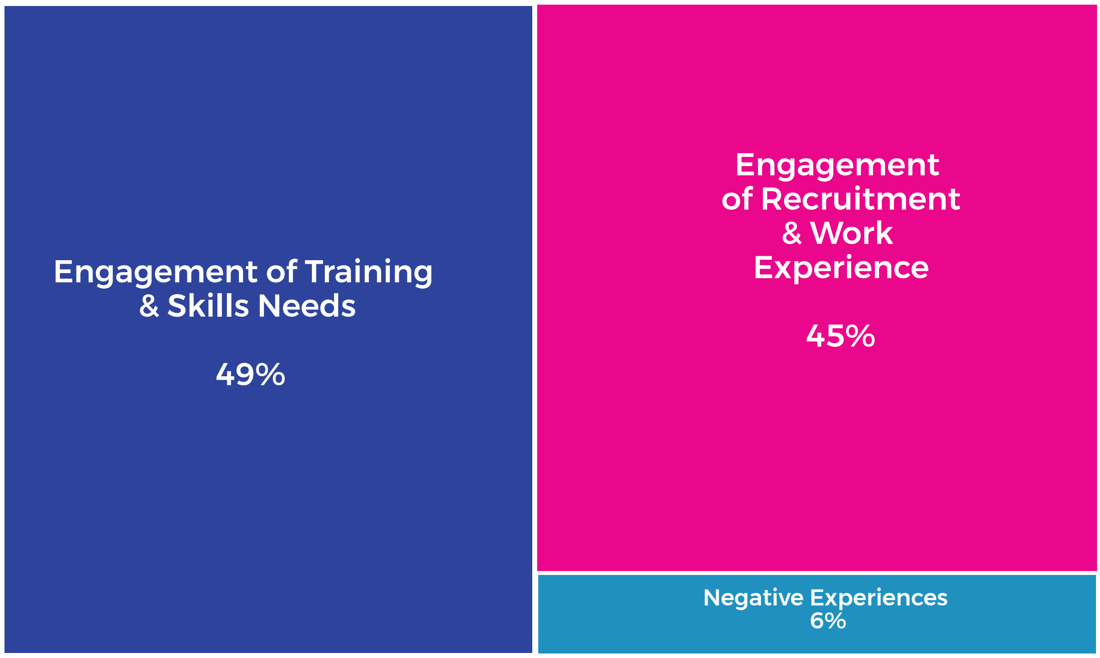

Q16. Types of Training provided
37%
31%
32%
External
Internal
Internal & External



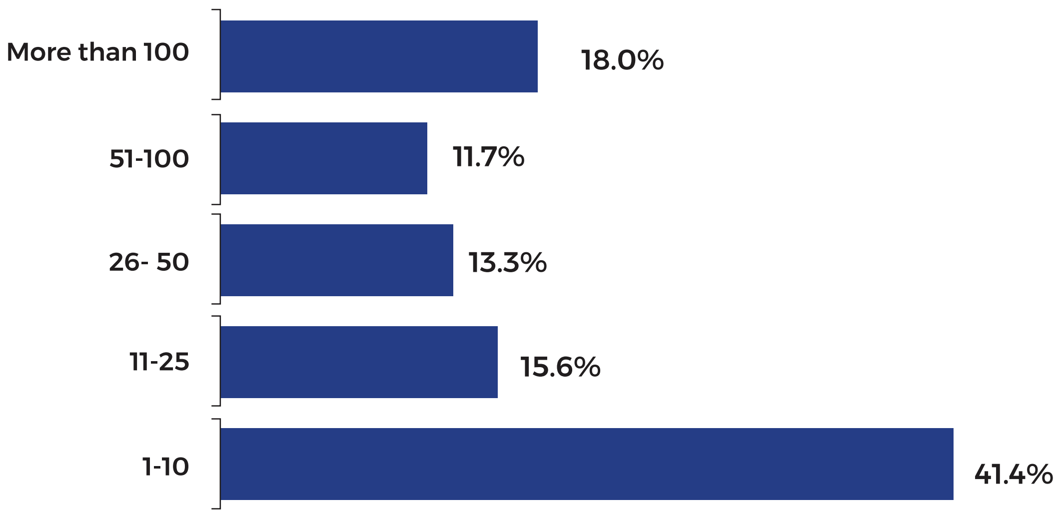

Q18. Do you – or have you ever – engaged directly with a Higher Education Institute, other further education providers (FET), and/or Education and Training Boards in Ireland around meeting industry needs and/or addressing skills gaps or shortages?



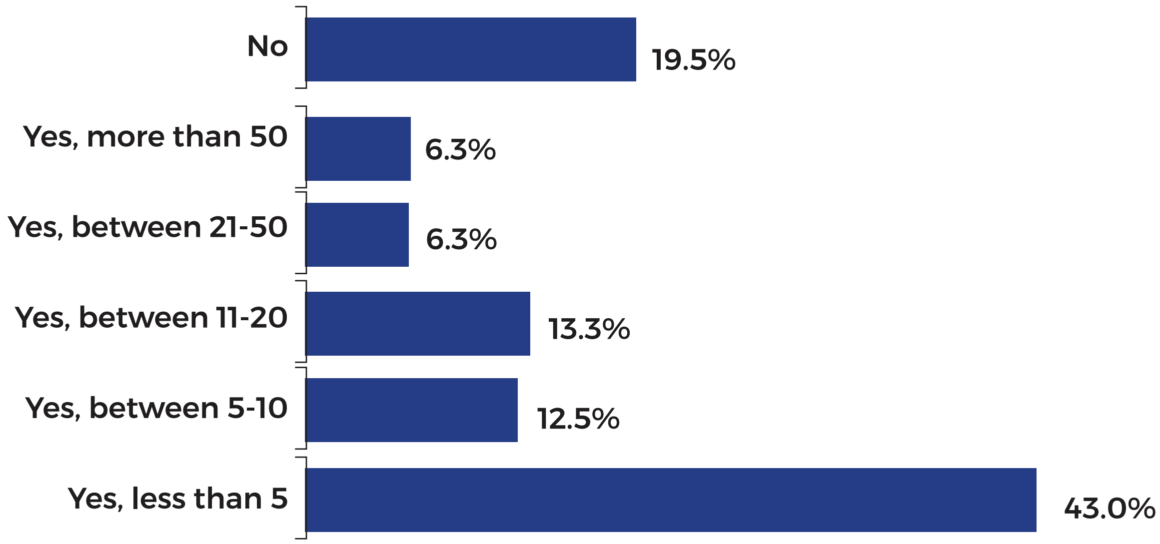
Q19. Nature of engagement with Education and Training Providers



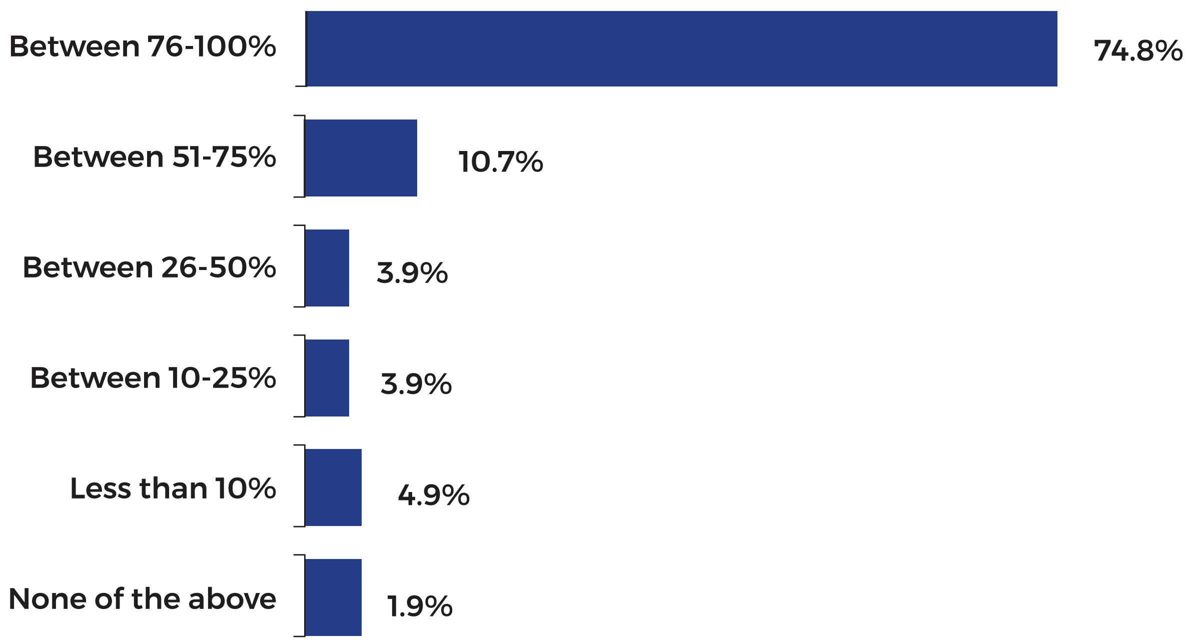

Q20. Approximately how many people does your company/organisation directly employ?



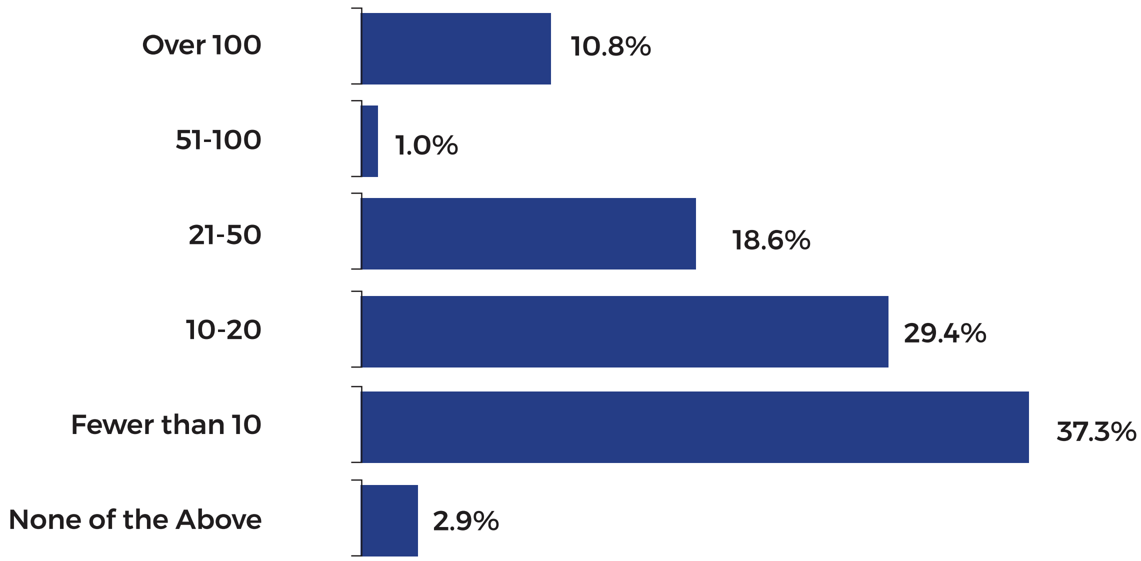
### Q21. Have you recruited any staff (of any type) within the past 12 months?



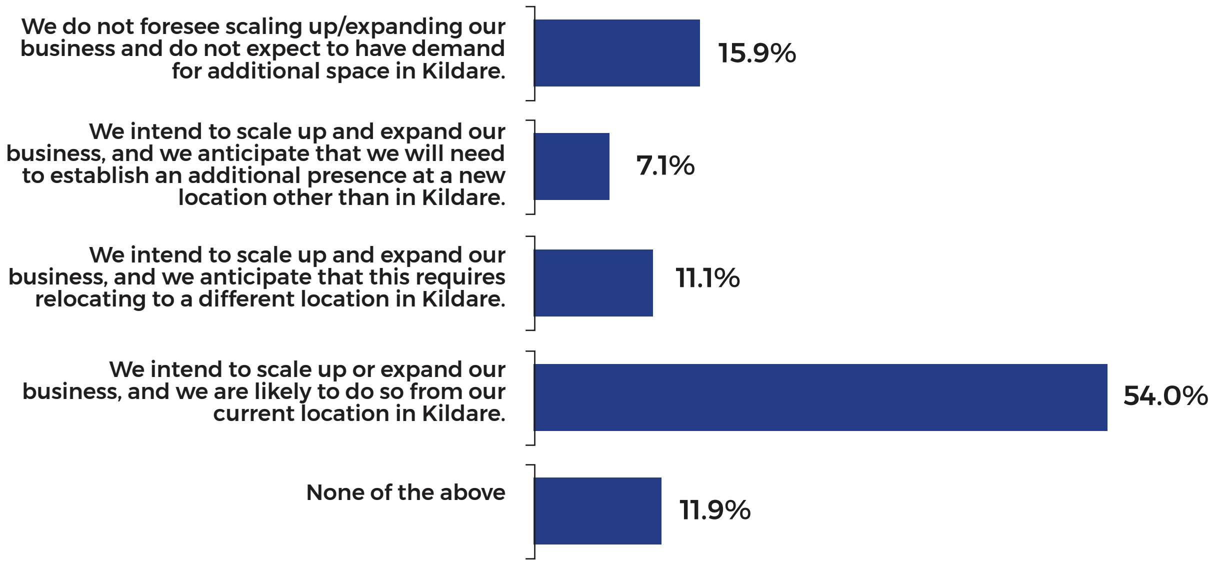

### Q22. If yes, what percentage of these new staff were recruited from within Ireland?



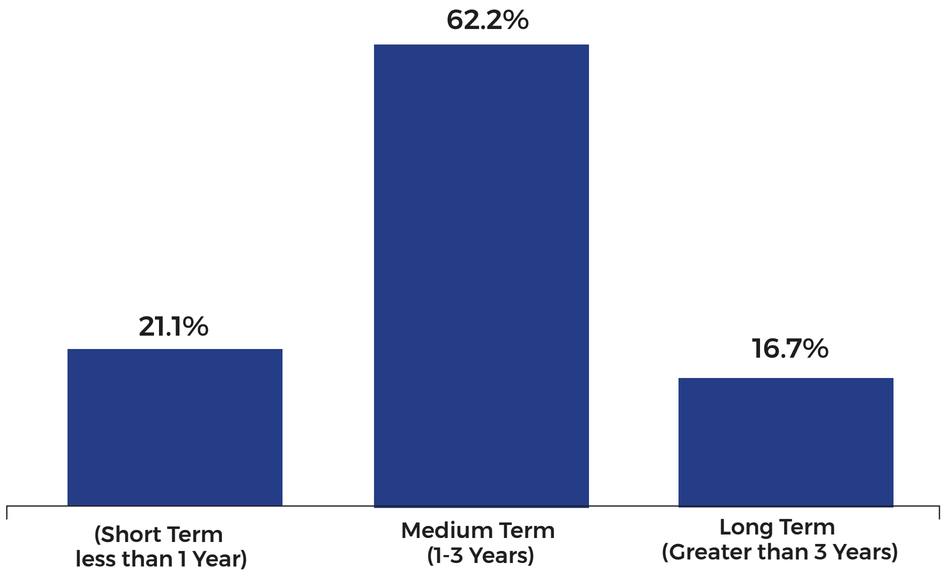
### Q23. Can you estimate the number of additional employees that will be required for your company over the next five years?



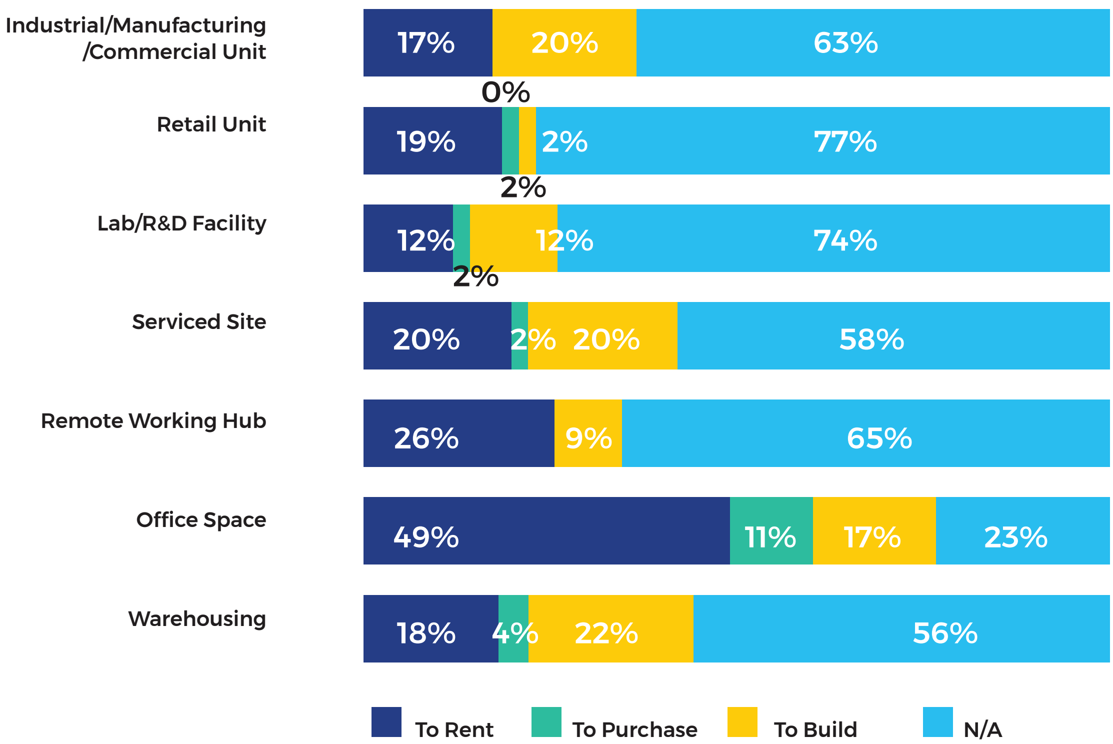

### Q24. What is your own position on scaling-up, expanding or relocating your operations in the future?



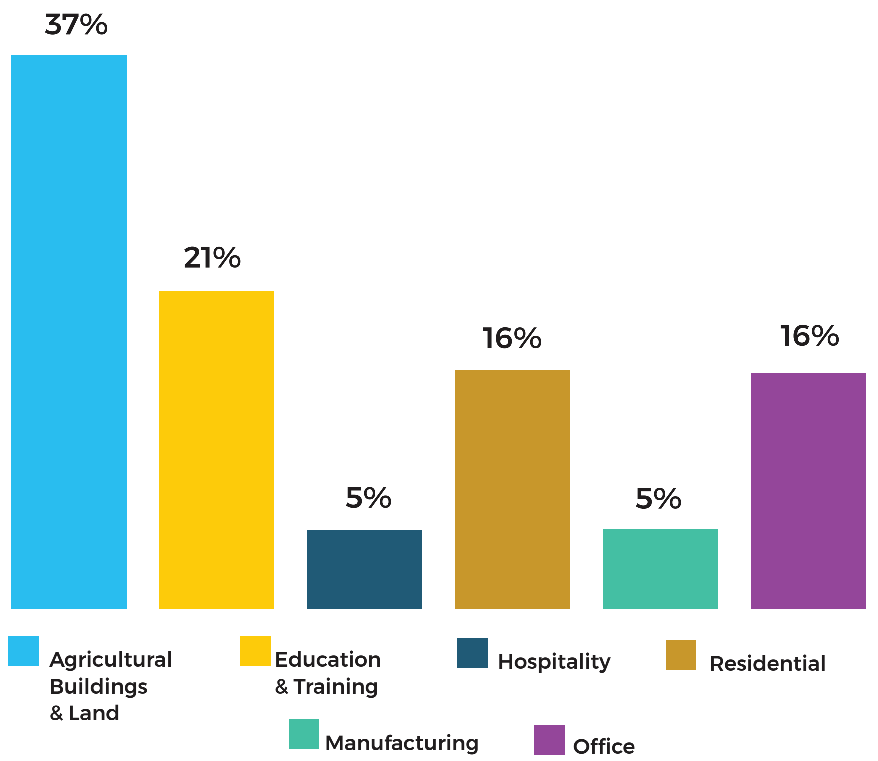
**Q25. If you intend on scaling-up, expanding or relocating your operations, what time-frame are you planning this over?**



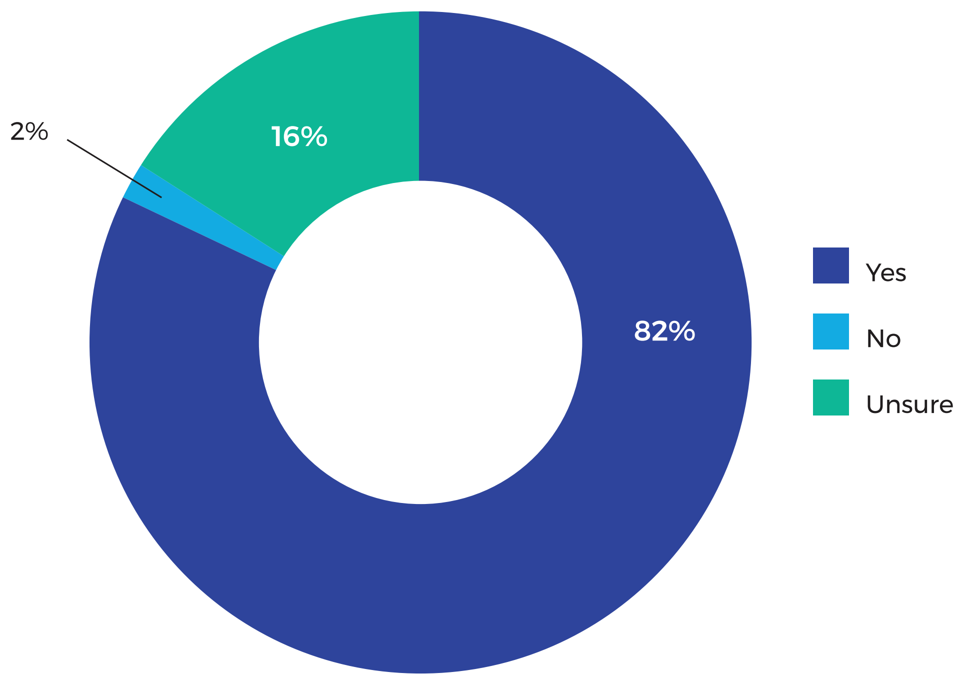

**Q26. What type of space below best describes this and what type of tenure you require in order to scale-up, expand or relocate?**



Q27. Other Types of Space Repuired

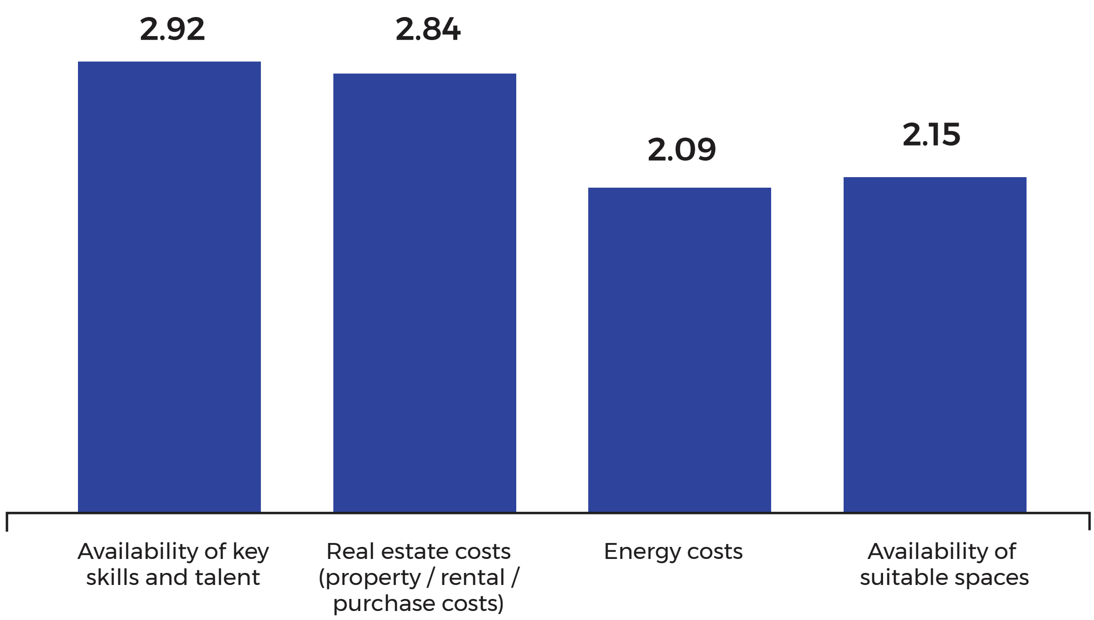



Q28. Do you believe there is potential for your industry/sector to further grow in County Kildare?

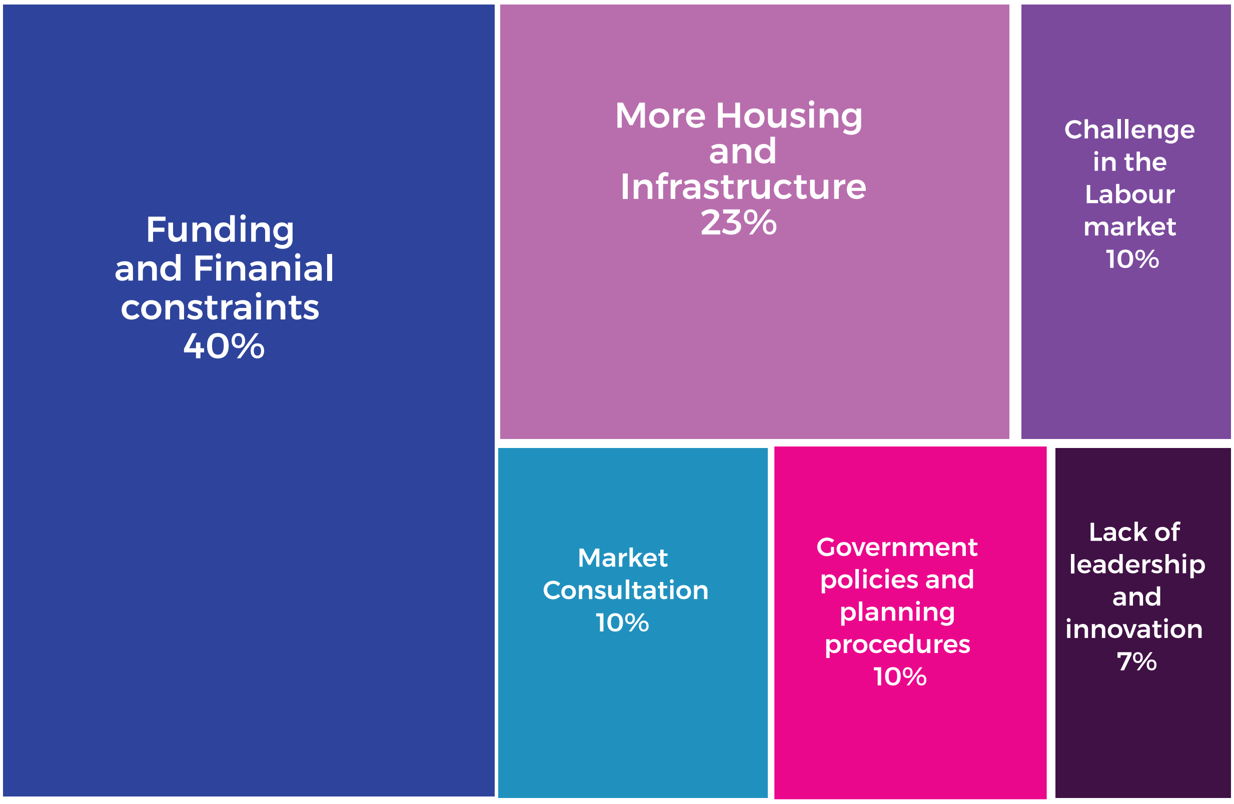


### Q29 What could be done by the Local Authority and other agencies to attract and facilitate further growth in the County?


### Q30. What are the existing barriers or challenges that restrict further growth?



**Q31. Are there any other barriers or challenges that are restricting growth?**



# Appendix 2 – List of Abbreviations

| Abbreviation | Detail |
|---|---|
| AI | Artificial Intelligence |
| ATU | Atlantic Technological University |
| BTEI | Back to Education Initiative |
| CDP | County Development Plan |
| CSO | Central Statistics Office |
| CX | Customer Experience |
| DART | Dublin Area Rapid Transit |
| DCU | Dublin City University |
| DFHERIS | Department of Further and Higher Education, Research, Innovation and Science |
| DKIT | Dundalk Institute of Technology |
| DoE | Department of Education |
| DSP | Department of Social Protection |
| ED | Electoral District |
| EGFSN | Expert Group on Future Skills Needs |
| ESG | Environmental, Social and Governance |
| EU | European Union |
| EV | Electric Vehicle |
| FET | Further Education and Training |
| FETAC | Further Education and Training Awards Council |
| FI | Fáilte Ireland |
| GDP | Gross Domestic Product |
| GPS | Global Positioning System |
| HE | Higher Education |
| HEI | Higher Education Institution |
| HGV | Heavy Goods Vehicle |
| HR | Human Resources |
| HRI | Horse Racing Ireland |
| IADT | Dún Laoghaire Institute Of Art Design and Technology |
| IBEC | Irish Business and Employers Confederation |
| ICT | Information and Communications Technology |
| IFA | Irish Farmers Association |
| IoT | Internet of Things |
| IT | Information Technology |
| ITBA | Irish Thoroughbred Breeders Association |

## Appendix 2 – List of Abbreviations

| Abbreviation | Detail |
|---|---|
| KCC | Kildare County Council |
| KWETB | Kildare and Wicklow Education Training Board |
| LECP | Local Economic and Community Plan |
| LEO | Local Enterprise Office LLM Large Language Models |
| MD | Municipal District MTU Munster Technological University |
| MU | Maynooth University |
| NCAD | National College of Art and Design |
| NFQ | National Framework of Qualifications |
| NPF | National Planning Framework |
| NSS | National Skills Strategy |
| NTA | National Transport Agency |
| NUIG | National University of Ireland, Galway |
| OECD | Organisation for Economic Co-operation and Development |
| OSD | Organisation Support and Development |
| PLC | Post-Leaving Certificate Course |
| PR | Public Relations PSM1 Professional Scrum Master 1 |
| QQI | Quality and Qualifications Ireland |
| R&D | Research and Development |
| RSES | Regional Spatial and Economic Strategy |
| RTITB | Road Transport Industry Training Board |
| SETU | South East Technological University |
| SME | Small and Medium-Sized Enterprises |
| STEM | Science, Technology, Engineering and Mathematics |
| TCD T | rinity College Dublin |
| TUD | Technological University Dublin |
| TUS | Technological University of the Shannon |
| UCC | University College Cork |
| UCD | University College Dublin |
| UL | University of Limerick |
| UR | Universal Robots |
| VTOS | Vocational Training and Opportunities Scheme |

Comhairle Contae Chill Dara
Kildare County Council

# County Kildare Skills Strategy 2024-2030

*in association with*

County Kildare Chamber
Advancing business together








Local Enterprise Office

BORD OIDEACHAIS AGUS OILIÚNA CHILL DARA AGUS CHILL MHANTÁIN
KILDARE AND WICKLOW EDUCATION AND TRAINING BOARD

Maynooth University
National University of Ireland Maynooth

Skillnet IRELAND

SETU
Ollscoil Teicneolaíochta an Oirdheiscirt
South East Technological University