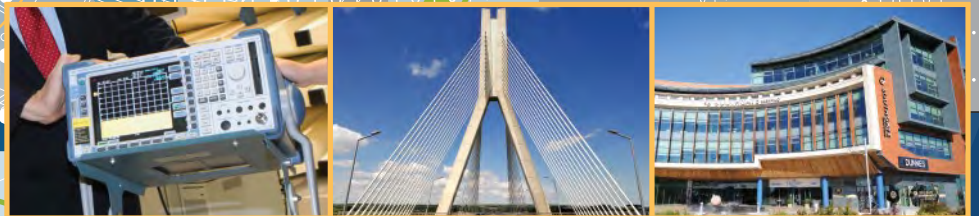


Economic Development Strategy for **County Meath** 2014-2022



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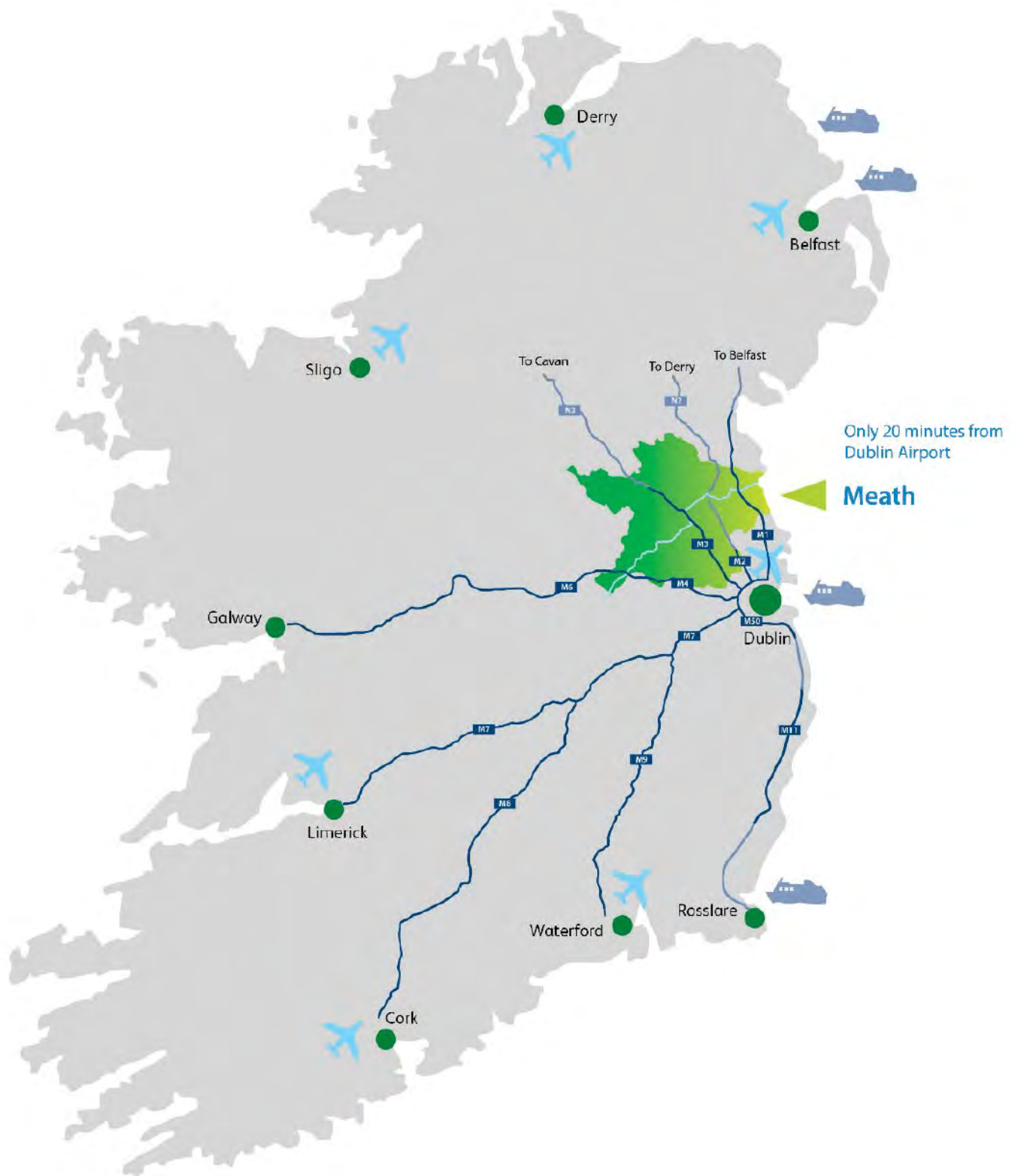
Local
Enterprise
Office



comhairle chontae na mí
meath county council

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Foreword

Five thousand years ago Meath was at the cutting edge of innovation in Europe. As Science Foundation Ireland recently pointed out, the megalithic tomb at Newgrange which is precisely aligned to flood the inner burial chamber with light on the shortest day of the year demonstrates the high level of engineering skills of our remote ancestors. The factors which led to the creation of Western Europe's first innovation hub in Meath, location and connectivity, a highly skilled workforce and a great quality of life, are still present. In point of fact they are stronger than ever.

Meath has recently been chosen as the location for a world class data centre which clearly demonstrates the high quality of our physical infrastructure. Meath's proximity to Dublin and Dublin's educational and transport infrastructure means that Meath has the potential to offer a world class location which has all of the advantages of a capital city but with a significantly lower cost base.

A business located in Meath has ready access to 60% of the State's postgraduate students and the talent pool is not just confined to students. We have a fast growing and distinctively young population together with an experienced workforce with deep skills across a wide range of sectors. Another major asset is the strong entrepreneurial spirit as evidenced by the vast number of enterprises based in Meath.

It is important that we plan ahead so that our youngsters have the skills and knowledge to take our county to the next level of innovation as they become the workforce of the future. Equally important is that we nourish and harness our entrepreneurial spirit so that it is translated into jobs that support our economy and quality of life and that help to address the daily outbound commute that faces our residents each day. I believe this strategy offers the opportunity to do just that by providing a roadmap for economic growth up to 2022.

The strategy does this by identifying the sectoral opportunities to expand the economic base of the county, such as investment in food and in the knowledge economy, as well as the areas we need to work harder on to be more competitive. In particular, a key challenge over the life of this strategy will be to attract greater Foreign Direct Investment by proactively engaging with and marketing ourselves to overseas investors and State employment agencies and reinforcing the message that we are open for business. I also believe this strategy clearly demonstrates Meath's compelling value offering to multinational companies.

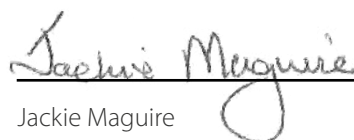
As well as tailored marketing initiatives, we also need to invest in our key economic centres as drivers of the wider local economy, supported by investment in transport, broadband and zoned employment lands.

Meath County Council is setting the pace as the leader of economic development at local level with this strategy and the architecture has been put in place to ensure effective delivery. This includes the enterprise team in the Meath Local Enterprise Office, our enterprise planning team, the Planning and Enterprise Strategic Policy Committee and the Meath Economic Forum.

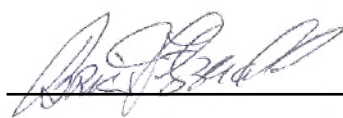
This strategy could not have come about without the input and experience of a range of people including the consultants PMCA, who worked alongside our economic team within Meath County Council and the Meath Economic Forum, NUI Maynooth who supplied the base line study and our elected members who have been supportive throughout the process.

The real prize for Meath is not just economic growth, but the opportunity to allow people not just to live in Meath, but to invest, to work in, and to learn here and so enjoy the high quality of life that this county has to offer.

I have no doubt that if this strategy is executed with energy and commitment Meath will be well on its way to being a cutting edge centre of innovation in the 21st Century, and a great place to live, work, and build a brighter future for our children.



Jackie Maguire
Chief Executive



Brian Fitzgerald
An Cathaoirleach



Executive Summary

Our Vision

Clear, concise, innovative and evidence-based measures aimed at accelerating the economic transformation, revitalisation and sustainable development of Meath

Key Outputs of the Strategy

- 1 An evidence-based approach to understanding and transforming the economic performance of the County.
- 2 Providing a roadmap for economic growth and opportunities.
- 3 Merging investment opportunities with land use planning.
- 4 Development of a series of key recommendations to enable the County to realise its economic potential and prosper as a distinct and diverse location to do business.
- 5 Translate key messages to various audiences via a range of marketing channels and actions.

Our Aims

7,500 new jobs*

40% increase in new investments

Additional client companies (15%)

Our Focus Sector

Indigenous

Reverse the downward trend in ratio of self employed income per head in Meath versus the State

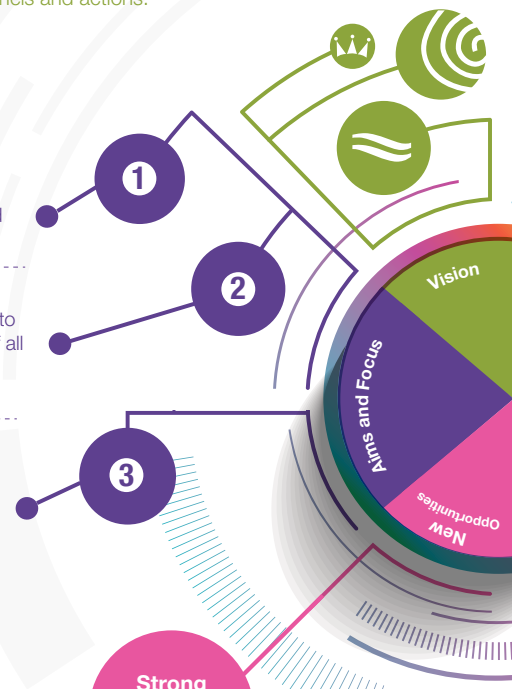
Indigenous

Maintain or widen the gap in favour of Meath relative to the country as a whole in respect of the proportion of all employment accounted for by agency-assisted Irish-owned enterprises (Meath 12% vs. State 8% in 2011)

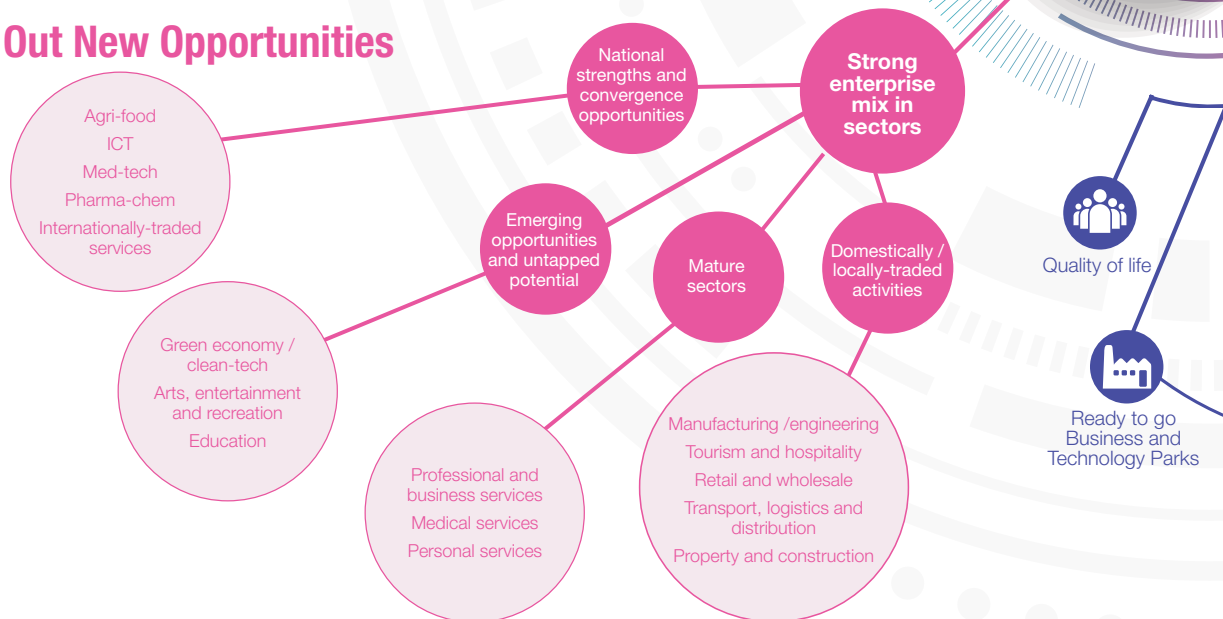
FDI

Narrow the gap against Meath relative to the State in regard to the proportion of all employment accounted for by FDI firms (recalling that the gap against Meath was 2.9% vs 7.9% in 2011)

*7,500 jobs = just over 900 jobs per year and 3 jobs per day!



Seeking Out New Opportunities



A Strategic Location

BUS AND RAIL SERVICES
Access to major cities and towns in Ireland.

LOCATION
The No.1 advantage for operating a business in Co. Meath followed by proximity to capital city and access to clients.



CONGESTION-FREE
No congestion & guaranteed journey times.



ACCOMMODATION
Over 1,000 serviced accommodation bedspaces, 65% of which are hotel spaces.



PORT TUNNEL
Dedicated route for Heavy Goods Vehicles between the Port, located in the heart of the national gateway (capital city of Dublin) and the national road network via the M50 Interchange.



MOTORWAY
4 of the 6 primary motorways to the national capital city including the Belfast- Dublin Economic Corridor.



PORT
1.7 million ferry passengers and 140,000 visitors on 86 cruise ships annually.



INTERNATIONAL AIRPORT
30 mins travel time: Europe's 6th largest airport for transatlantic connectivity. 21.7 million passengers annually; 161 destinations globally.

Unique Selling Points

A Location of Choice for Business and People

ALMOST 80%

Almost 80% of Meath businesses surveyed are 'happy' or 'very happy' with being located in Meath.

40%

Critical Mass of Talent
1.8m people in the region = 40% of the country.

57%

Knowledge Economy
8 higher education institutes = 57% of all postgraduates.

37

We have a wide range of nationalities living locally with 37 languages spoken as a first language which offers language skill set to support any global business operating in Meath.



TOP 10

Tayto Park is one of the top 10 visitor attractions in Ireland.

42%

Labour Force
910,000 people = 42% of the country.

50%
GDA contribution to total GVA

A Productive Location

Meath forms part of the Greater Dublin Area (GDA) with 50% Gross Value Added (GVA) of Ireland in this region.

Business Supports

K

Kells Regional Aid Area

Business Infrastructure

(GDA contribution to total GVA)*

32%
INDUSTRY

(GDA contribution to total GVA)*

57%
SERVICES

13%
AGRICULTURE

(GDA contribution to total GVA)*

Sectoral Strengths to support new investments:
ICT, Financial, Professional, Wholesale and Retail, and Human Health.

Economic Strategy: 8 Point Plan

INTERNAL ENGAGEMENT

- 1 Create and promote a culture that supports sustainable economic development practices within Meath County Council.

EXTERNAL ENGAGEMENT

- 2 Engage and work with State Agencies, Regional Agencies, Higher Education Institutions and Local Enterprise Agencies to stimulate and grow economic development in Meath.
- 3 To collaborate with wealth creators and business innovators who have the capacity to assist in job creation and entrepreneurship.

SPATIAL IMPLEMENTATION

- 4 Promote our towns and strategic employment sites as the economic drivers for employment in Meath while acknowledging the role of the rural economy.
- 5 To identify and support investment in infrastructure and services that enable and deliver economic development.

FISCAL INCENTIVES

- 6 Meath County Council to examine financial incentives designed to aid the delivery of the employment generation.

MARKETING

- 7 Meath County Council to develop a marketing plan and initiatives aimed at promoting the economic strategy.

REVIEW AND MONITORING

- 8 To review and monitor progress and trends in implementing the economic strategy and action plan.

**This
strategy
is
about economic development.
jobs and investment.
harnessing the capacity
and potential of people.**

Introduction and Background

*“This strategy is about economic development.
This strategy is about jobs and investment.
This strategy is about harnessing the capacity
and potential of people....
This Council is open for business”.*

The purpose of this strategy is to provide clear, concise, innovative and evidence-based measures aimed at accelerating the economic transformation, revitalisation and sustainable development of Meath.

This Strategy sets out the ambitious but attainable target of creating 7,500 jobs in Meath by 2022. This will be achieved by increasing the employment in both indigenous and foreign owned, agency supported business in Meath.

Small businesses account for the vast majority (92.4%) of enterprises in Meath and supporting small indigenous businesses is fundamental to the delivery of this ambitious job creation strategy.

Meath County Council now has primary responsibility for the economic development of the county. This strategy was prepared to provide the Council with a road map for developing that potential and ensuring that Meath both is, and is recognised to be, a highly competitive and attractive location in which to do business and to create jobs.

During the period of the Celtic Tiger Meath experienced rapid population growth, rising to 184,000 inhabitants. However, this rapid growth was not matched by the growth of a sustainable employment base within



L-R: Dr Pat McCloughan, PMCA Economic Consulting; Councillor Jim Holloway, Cathaoirleach to Meath County Council in June 2015; Jackie Maguire, Chief Executive, Meath County Council; Frank Ryan, Chairman of the Board, IDA Ireland; Kevin Stewart, Director of Planning, Enterprise & Environment, Meath County Council.

the county. As a result, Meath has a highly skilled and educated workforce, but many of these workers commute outside the county to work.

This skilled educated workforce represents a major asset to the county. Meath is both one of the youngest counties in Ireland in terms of its population, and one of the oldest in terms of its rich history and unique cluster of world-class historic sites.

Its proximity to Dublin and Dublin's educational and transport infrastructure means that Meath has the potential to offer a world class location which has all of the advantages of a capital city but with a significantly lower cost base.

Meath has weathered the recession far better than many other counties. Unemployment is low compared to the rest of Ireland and is falling rapidly, but Meath has the potential to do even better.

The key challenge for Meath is to create more jobs within the county so that more people who live in Meath can work in Meath, and that the County is seen not only as a place to visit and live in, but to invest and work in.

This is critical to improve the lives of people living in Meath and to strengthen the social cohesion of communities in the county.

Meath County Council has a key role in making this happen. Local authorities are today expected to play a greater and more proactive part in assisting economic development and job creation.¹

With a new statutory remit for economic development, Meath County Council is now the lead agency providing business support and promoting enterprise in the county.

This strategy seeks to put the Council at the forefront of best practice for economic development. It also represents a positive response to improving the county and region from a social and community perspective as well as economically. In doing so, the Council is proactively engaging with and building relationships with businesses as well as the wide range of other stakeholders who have a role in economic development.

This strategy is not an isolated initiative. It has been prepared under the framework of the national Action Plan for Jobs² and is aligned with the IDA's strategy *Winning Foreign Direct Investment 2015-2019*³ and with Enterprise Ireland's Strategy. In turn this strategy will form a critical component of the Regional Action Plan for jobs and a core component of the Meath Local Economic and Community Plan, which will give the strategy statutory effect.

The strategy is also framed with reference to Europe 2020 targets for employment, innovation, education, social inclusion and climate/energy to be reached by 2020.

The strategy also seeks to raise awareness amongst stakeholders and the community about the new and enhanced capacity of the County Council to support business and economic development.

The key outputs from the strategy include:

- An economic vision for the county – centred on evidence based approach to understanding and transforming the economic performance of the country.
- A roadmap - identifying sectoral opportunities for economic and employment growth.
- Key recommendations to enable the county to realise its economic potential and prosper.
- The integration of these recommendations with land use planning proposals.
- A marketing plan with key messages and channel policy to support the strategy.
- An action plan to implement the key recommendations and bring the vision to life.

¹ Putting People First -Action Plan for Effective Local Government, 2012

² <https://www.djei.ie/en/What-We-Do/Jobs-Workplace-and-Skills/Action-Plan-for-Jobs/>

³ http://www.idaireland.com/en/docs/publications/IDA_STRATEGY_FINAL.pdf

STUDY APPROACH

This report is based on extensive desk research and wide stakeholder consultation. It is also informed by the relevant policy environment (nationally, regionally and locally) and economic developments, including those affecting foreign direct investment (FDI) which is a key issue for Meath.

In summary, this study has been informed by:

- Assessment of international and national economic trends, which include national economic growth assumptions and their role in the context of the Economic Development Strategy for Meath.
- The Meath Economic Baseline Study, prepared by Maynooth University.
- Review of the regional and local policy contexts relating to the Meath economy.
- Quantitative analyses of economic data relating to the structure and performance of the local Meath economy, including people resources, employment and unemployment, educational attainment, FDI, indigenous industry development and tourism, obtained from various bodies.
- Quantitative and qualitative analyses of a large range of information and data garnered from an extensive consultation programme with various stakeholders in the economic development of Meath.
- Projections of the level of employment in County Meath to 2022, using the 2011 situation as the benchmark and carrying out sectoral projections of what can be achieved based on the inherent strengths of the local economy and specific sectoral opportunities.
- Assessment of spatial planning opportunities in the form of identified sites around the county and the fit of these locations in the context of the relevant Meath County Development Plan.

THE ECONOMIC CONTEXT

The Global and EU Context

The world is recovering from the global financial crisis. There are signs of a return to growth both in the EU and US economies. While there are a number of threats to global growth (e.g. slowing growth in China, Brexit, etc.), indicators suggest growth is to be expected over the life of this strategy.

However, competition for FDI is increasing from other markets, particularly in Asia. According to the current IDA strategy '*Winning FDI 2015-19*', it is envisaged that investment focus for Ireland will continue in the US and European markets, while consolidating progress in the growth markets i.e. India, China, Singapore (ASEAN - including Malaysia, Thailand, Philippines, Indonesia, and Vietnam), South Korea, Japan, Australia/NZ, Russia, Israel, Brazil and South Africa.

New EU Regional Aid Map 2014-2020

One of the most significant new funding opportunities for Meath is the EU Regional Aid Map for Ireland, which now includes Kells and other parts of north Meath in an area corresponding to the former Kells Electoral Area. This important development represents a unique opportunity to promote both indigenous and FDI employment in that part of the county.

The new map means that the Irish government will be able to provide enhanced financial assistance to the eligible areas identified in the designated regional aid area. The aid will include EI and IDA Ireland grants to Irish and foreign firms. The aid will also include tourism grants, urban and rural renewal incentives. The new source of aid will be subject to limits and the aid intensity rates (capital and employment grants) are 30% for small firms, 20% medium firms and 10% large firms. While the design of the aid is directed towards micro, small and medium firms, larger firms are also eligible, where the rules specify that large-firm aid should be directed at new activities, diversification of existing firms into new products or process innovation.

The significance of the new map for Kells and environs in the north of the county is that it will support the

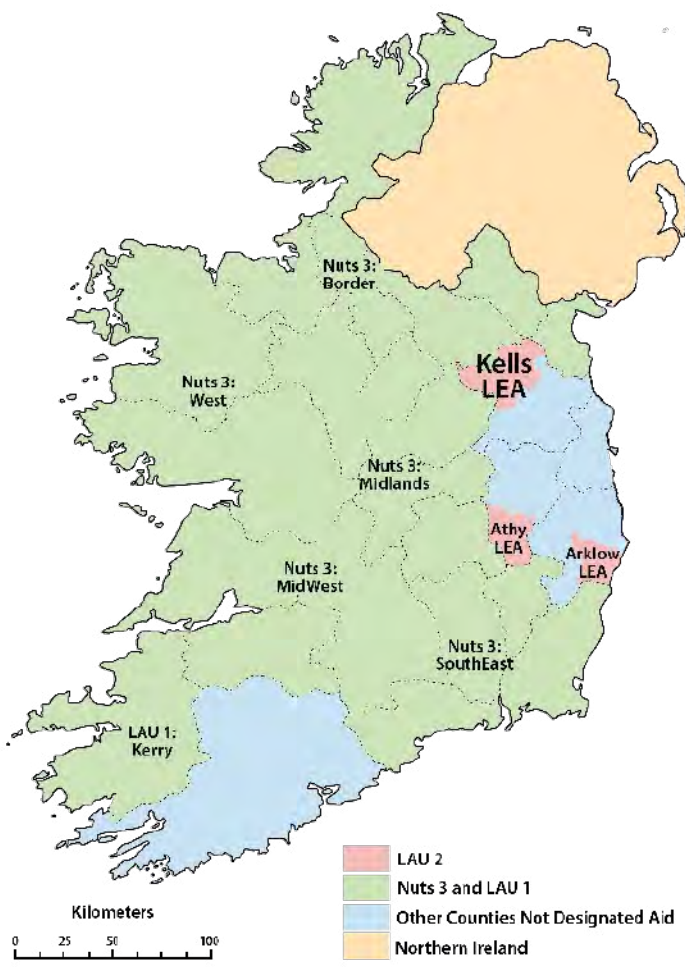


Figure 1: Regional Aid Map for Ireland (2014-2020)

development and diversification of the local economy as well as providing increased financial support to enterprises (indigenous and foreign-owned) in the area.

The National Context

Strong job creation and other indicators suggest Ireland's economic recovery is broadening. The Irish Government's ability to borrow on the markets, the improving fiscal situation, the scale of job creation and falling unemployment rates, all point towards growth and a more positive operating environment. In addition, recent years have seen growing FDI and employment growth among agency-assisted Irish-owned companies (Meath has been performing well on the latter front but less strongly on FDI). Tourism is growing and there are signs of returning consumer confidence in the form of higher retail sales and increased, localised activity in the property market.

Scotland and Northern Ireland and the wider UK are likely to become stronger competitors for FDI in the coming years. If Ireland is to respond it must develop its offering to foreign companies in areas such as education and innovation rather than relying solely on its low rate of corporation tax.

Structural reforms and improvements in banking sector costs, competition restrictions and the cost of doing business will also make Ireland more attractive as a business location and improve the country's economic performance.

The Regional Context

The economic performance of Ireland's regions varies considerably. While Dublin has gained a large share of all FDI into Ireland, some smaller urban centres around the country have also succeeded in attracting new FDI and growing their existing FDI companies. This has resulted in the development of FDI clusters in some regions e.g. Pharma clustering in the South West, and ICT in the Dublin Region and Mid-East Regions.

These regional differences are highlighted in a 2013 report entitled *Regional Indicators Report – Monitoring Framework for Implementation of the Regional Planning Guidelines 2013*. Some of the key findings suggest there remains room for improvement in all regions in reaching Europe 2020 employment rates. The economic dominance of the Dublin Region (42.1% of total Gross Value Add (GVA)) by sector and the South West (17.5% of total GVA by sector) is also evident with the remaining regions contributing less than 10%.⁴

On the one hand this illustrates the need for a more focused regional policy. On the other hand it highlights the role of commuters and the impact they have on regional GVA. When looking at the GVA for the Mid-East Regions for example, it is important to note these figures are distorted by commuting, since the output is measured where it is produced rather than where the individuals who produce it actually live. This has particular significance for Meath where there are high rates of outbound commuting.

⁴ Meath formed part of the former Mid East Region which also included Counties Wicklow and Kildare. The new strategic planning (and investment) region includes Louth in addition to aforementioned counties.

As long as Ireland can sustain its attractiveness as a host location for inward investment, different parts of the country as well as Dublin are likely to continue to benefit from the country's disproportionately large share of FDI into Europe, reflecting the proactive work of the IDA, labour skills and Ireland's comparably low rate of corporation tax.

The Central Statistics Office's population projections show that the Mid-East Region (Counties Meath, Kildare and Wicklow) will be the fastest growing region in the state for the foreseeable future:

- The population is projected to grow by 10.3% compared with 6.6% for the State between 2011 and 2021, and
- The population is anticipated to expand by 20.6% as opposed to 13.4% for the country as a whole during 2011-2031.

During the same periods, Dublin (four local authority areas) will also grow more rapidly than the State, and the Greater Dublin Area (GDA)⁵ is expected to grow by 8.5% during 2011-2021 and by almost 18% between 2011 and 2031, increasing its share of the national population from 39% in 2011 to 41% in 2031. This seemingly small 2-percentage points increase in share is substantial.

Coupled with the expected greater concentration of skills, resources and innovation potential in the GDA, this key part of the country is set to play an even greater role in the overall economic development of Ireland.

The Local Context

As part of "Putting People First" – Action Plan for Effective Local Government (2012), local authorities are required to take a more proactive approach to facilitating enterprise and economic development. Under the new local authority arrangements, Meath Local Enterprise Office (LEO) is bringing together the experience, intelligence and knowledge of the former CEBs⁶ and business support teams to provide a one-stop-shop for all business enquiries and act as the connection point between local businesses and the State enterprise

⁵ The GDA includes the seven local authority areas of Dublin City, Fingal, South Dublin, Dun Laoghaire Rathdown, Meath, Wicklow and Kildare.

⁶ CEB- County Enterprise Board

development agencies with a remit in Meath (EI, IDA Ireland and Údarás na Gaeltachta⁷).

The mission of the Meath LEO is to promote entrepreneurship, foster business start-ups and develop existing micro and small businesses to drive job creation and ensure relevant and accessible high quality supports for business ideas. It is intended that the scope of beneficiaries and/or clients of the LEOs will be wide-ranging, including first-time and young entrepreneurs as well as micro and small businesses already in operation.

Local Economic and Community Plan

The Local Economic and Community Plan (LECP) sets out the objectives and actions needed to promote and support the economic, local, and community development of County Meath over the next six years. The Plan serves as one of the primary strategies guiding development in County Meath. It also seeks to act as:

- A guide for public bodies and publicly funded agencies in their ongoing broader contribution to the social, economic and cultural development of County Meath, and
- An enabler for the community, voluntary, environmental and private sectors in their ongoing contribution to the social, economic and cultural development of County Meath.

This economic strategy and its findings have been designed to inform the economic element of the LECP.

HOW LOCAL AUTHORITIES CAN ASSIST ECONOMIC DEVELOPMENT

As stated above, recent policy changes have given Local Authorities a far greater role in driving local economic development. The following section outlines the range of policy instruments available to Meath County Council to promote economic development, and gives some sense of the potential that Local Authorities have to make a positive tangible difference to local economic development.

⁷ The Meath Gaeltacht is located near Navan with approximately 1,800 persons.

Planning and Infrastructure

Traditional

- Maintenance and improvement of roads, energy and public housing.
- Planning - facilitating 'deal making' with job creation potential (subject to zoning and looking after the wider public interest).

Innovation Orientated

- Broadband – proactively engage with central government to deliver high speed broadband locally.
- Educational infrastructure - all levels of the educational lifecycle.
- Continued development of facilities such as business parks, incubation and research centres.

Marketing and Promotion

- Marketing and promoting the area as a location for investment, enterprise, economic activity and tourism in partnership with State agencies, third level institutions, enterprises and other organisations. The marketing function of local authorities should aim to complement those of businesses' own campaigns and of initiatives by chambers of commerce and other local business groups.

Business Support



Oifig Fiontair Áitiúil

Local Enterprise Office

Oifig Fiontair Áitiúil An Mhí

Local Enterprise Office Meath

- Provisions of information regarding what supports are available through the Meath Local Enterprise Office and other State agencies. It is important that Meath LEO develops a reputation for being effective in its knowledge and understanding of available supports and for sign posting clients towards the most relevant support channels for their needs.
- LEOs are expected to act as brokers to clients having export potential vis-à-vis Enterprise Ireland.

- Reaching out to other publicly funded business support agencies that have incentives to support local economic development and job creation.
- Acting proactively as a one stop shop for micro businesses and small enterprise as well as having the ability to listen and respond to the needs of larger enterprises.
- Thinking 'enterprise' in setting commercial rates and incentivising job creation through reduced contributions as appropriate.
- Reducing, as far as possible, red tape and ensuring there are no disproportionate requirements on local authorities (for example in the area of tendering) and thinking about competitiveness and better regulation.
- Learning from and developing best practices.
- Being alert to external funding opportunities of potential benefit to local businesses and the local economy e.g. EU funding programmes.

Data and Intelligence

- Making available data and analysis of local economic conditions, resources, issues and trends including provision of information of interest to potential investors.
- Ensuring the compilation of relevant and up to date intelligence to inform economic development, monitoring and implementation – in tandem with stakeholders – and a framework for capturing and reviewing performance.
- Being aware of the economic potential of particular intelligence unique to local authorities in their day to day work.

Other

- Organising and facilitating relevant events such as investment, business supports, networking, tourism and demonstrator projects.
- Continued focus on reducing local authority costs and ensuring that they are passed on to business and households.
- Bringing to the attention of central government any issues requiring action for the betterment of enterprises, households and the local environment.
- Having a "can do" attitude.

Economic Vision for County Meath

MEATH'S OVERARCHING VISION IS:

Meath to be a county that fosters sustainability, throughout its vibrant communities, dynamic economy and unique cultural and natural heritage.

The tenets of Meath's economic vision are designed to support this overarching vision. This report is aimed at bringing the economic vision to life by providing clear, concise, innovative and evidence-based measures to accelerate the economic transformation, revitalisation and sustainable development of Meath.

TENETS OF THE ECONOMIC VISION FOR COUNTY MEATH

- A flourishing, innovative and cost-competitive location in the heart of the National Gateway that is recognised locally, nationally and internationally as a highly attractive and distinctive centre in which to conduct business.
- Seamless access to skills, infrastructure and services, and markets (international and national).
- An exceptional environment for starting and growing enterprises, with clusters of FDI and indigenous companies in vibrant economic centres around the county proactively supported by Meath County Council working in collaboration with other economic support agencies local and national.
- A centre for innovation in traditional industries such as food.
- A pro-sustainable development county, Meath is characterised by a large number and varied range of serviced sites and property solutions to suit the needs of large and small businesses in all sectors, including agri-food processing, other manufacturing and various services.
- Home to one of Ireland's leading visitor destinations – the Boyne Valley – County Meath provides visitors with a large and varied choice of attractions, accommodation and eateries, leisure and entertainment facilities, and events throughout the year.
- Meath's award-winning market towns offer attractive and competitive shopping locations, combining a mix of traditional and modern retailing experiences in a unique and differentiated setting.
- Meath takes pride in its unique place in Ireland and Irish history, dating back many centuries to when the 'Royal County' was the centre of the island of Ireland. Meath's unparalleled place in the country's formation includes the UNESCO World Heritage site of Newgrange, Trim Castle (the largest Norman castle in Ireland), the Hill of Tara, the site of the Battle of the Boyne (the most important battle ever fought in Ireland) and the River Boyne's associations with Irish legends, including An Bradán Feasa (The Salmon of Knowledge) and Fionn Mac Cumhaill (Finn McCool).

The following map, Figure 2, translates this vision into practical job creation targets. Employment growth in Meath is the key metric by which the success of this strategy will be judged.

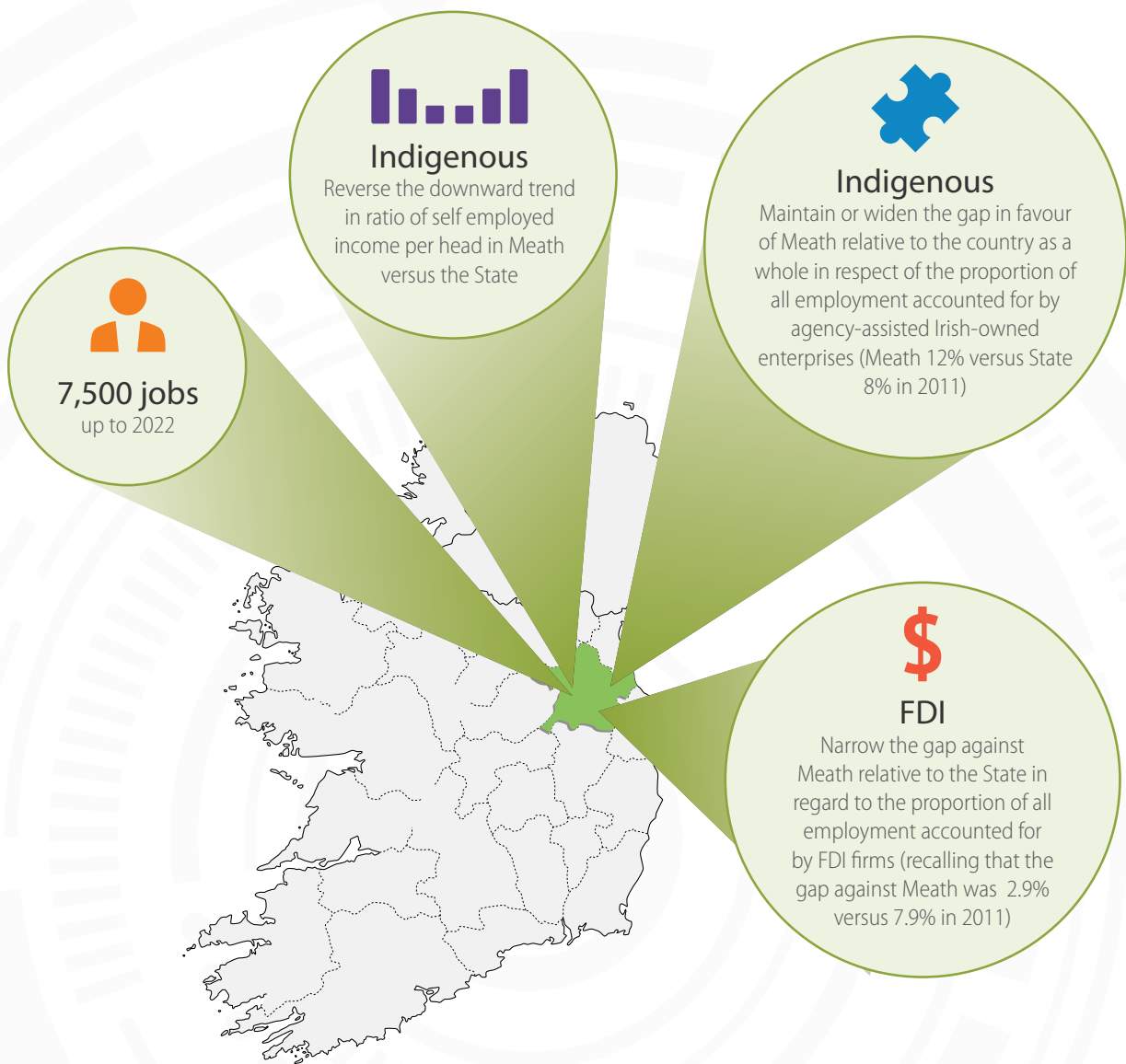


Figure 2: Job creation targets for Co. Meath

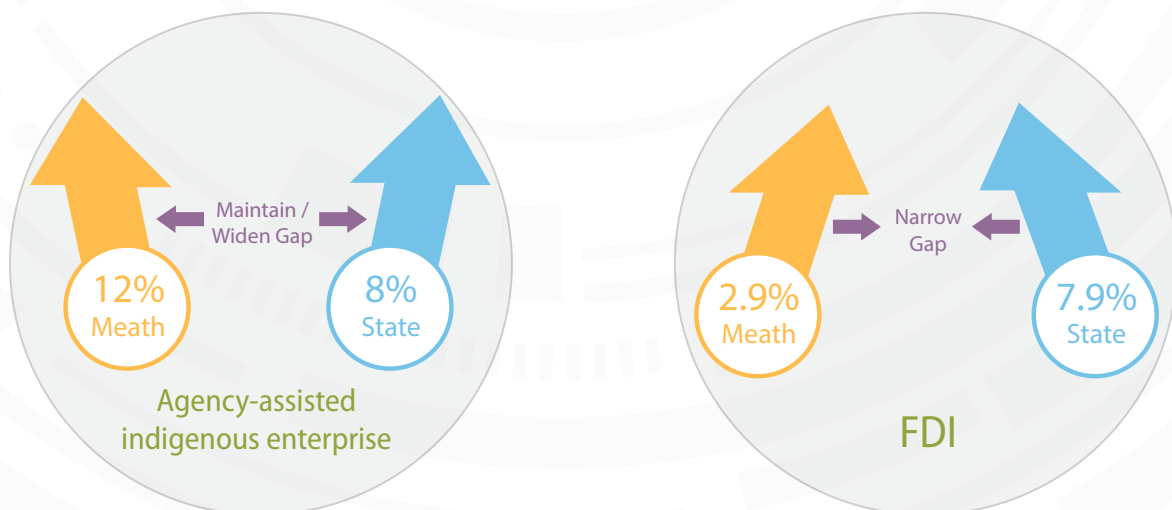


Figure 3: Targeted Trends for Employment and Agency Assisted Firms- Meath v State

County Meath

An Economic Profile

This section of the strategy provides an economic profile of Meath. It is based on the economic baseline study of Meath prepared by Maynooth University and All-Island Research Observatory (AIRO) (June 2013), with additional analysis by the project team. This section provides an overview of Meath's

- Demographics & People Resources
- Income Performance
- Employment & Enterprise
- Outbound Commuters
- Education
- Skills & Training
- Tourism & Heritage
- Infrastructure
- Quality of Life

Regional Statistics (GDA)



1,800,000 population

Just under 1 million in labour force

38.3% Youth Dependency Rate

12,000+ non-Irish residents (Language Fluency)

37 languages spoken as first language

Local Statistics (Meath)

5th

highest rate of
population growth in
Ireland



7th

highest population in
Ireland



2nd

highest labour force
participation rate
(65.8%)



DEMOGRAPHICS AND PEOPLE RESOURCES

Key Points

County Meath has:

- A large and growing population – one of the fastest growing in Ireland during the period 2006-2011.
- A high proportion of young people/children for future labour supply.
- A low old age dependency rate.
- One of the highest Labour Force Participation (LFP) rates in the country (65.8% versus 61.9% for the State in 2011).
- Live Register data suggests that the unemployment problem is easing relatively rapidly in Meath as a whole, in the main urban centres of Navan, Trim and in Kells.

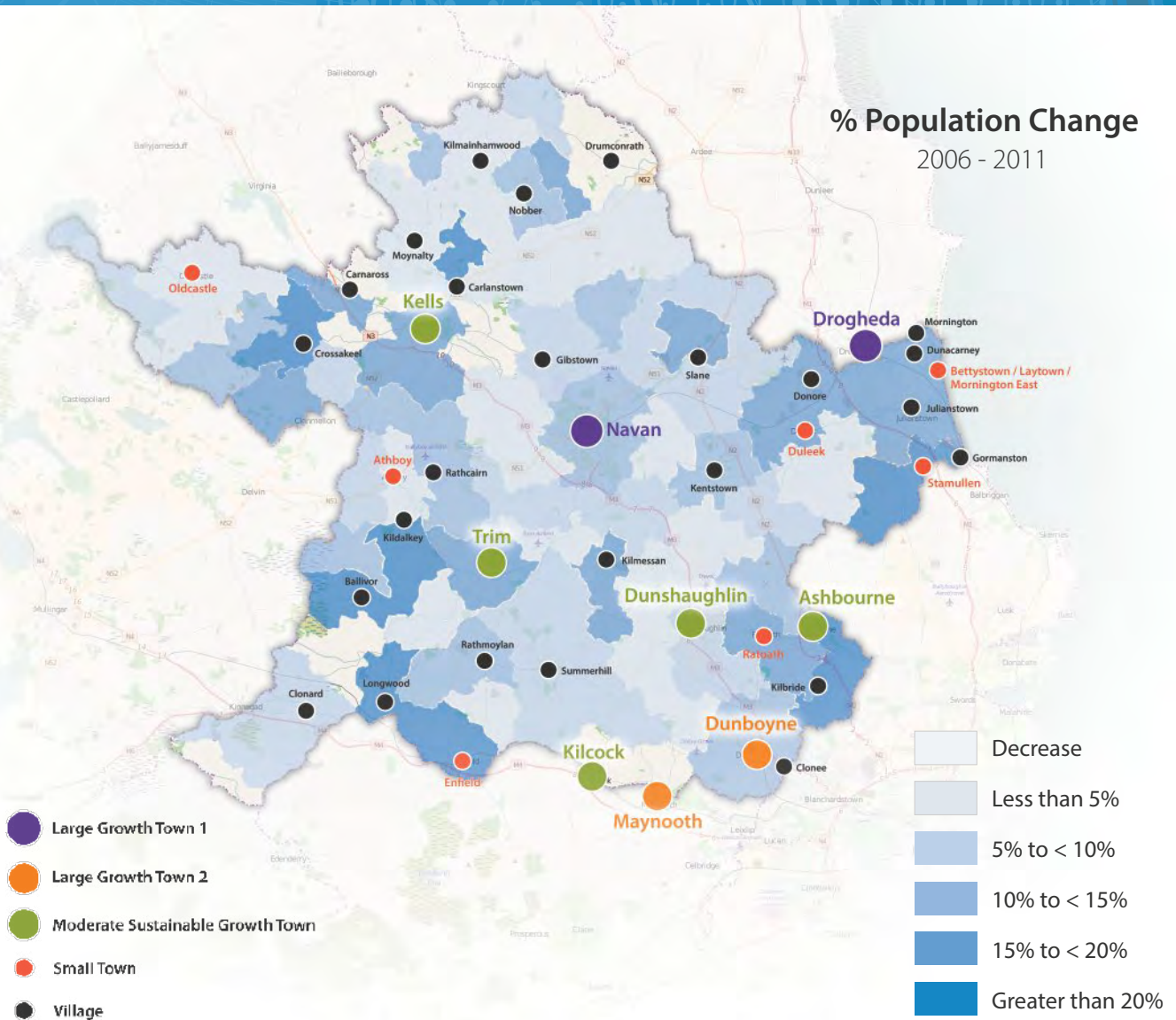


Figure 4: Summary profile of Demographics and People Resources

Demographics

Meath has a large and rapidly growing population. According to the 2011 census, the total population within Meath was 184,135 people. Meath now has the seventh highest population of all local authorities in Ireland (4% of State and 10% of the Greater Dublin Area). Between 2006-2011 Meath experienced the 5th highest rate of population growth within Ireland with an increase of 21,304 people or 13.1% (the State average was 8.2%). 90% of all Electoral Divisions (EDs) showed growth, with the highest rates occurring in the larger settlements and along the eastern corridor of the county.

Labour Force Participation

Meath has the second highest labour force participation rate (ratio of the labour force to population aged 15 years and above) in the country at 65.8% and is far higher than the national figure of 61.9%.

Live Register Movements

Unemployment is falling in Meath. In July 2011 the Live Register peaked nationally at 470,000, of these 12,350 were on the Live Register in Meath. Between then and March 2014, the number of people on the Live Register fell by 22% in County Meath, one of largest rates of decline in the country.

Dependency Rates

The total dependency rate is given as the sum of the youth and old age dependency rates. County Meath had a relatively high youth dependency rate due to its rapidly growing young population (38.3%) in 2011. On the other hand, it had a comparably low old age dependency rate in that year (13.5%). Combined, the total dependency rate in Meath is (51.7%).

Ethnicity

According to the data analysis there were over 12,000 non-Irish residents in Meath in 2011, spread across the EU15 (excluding Ireland and the UK), New Member States (mainly Poland and Lithuania) and a number of residents from Africa and Asia.

INCOME PERFORMANCE AND AFFLUENCE

The following section looks at the income and affluence of Meath residents as this is an important indicator of overall economic performance.

Key Points

County Meath is a prosperous county.

County Meath is:

- One of only four Irish counties where primary income exceeds disposable income.
- The third highest ranked county by the ratio of primary income to disposable income in 2011 (after Dublin and Kildare).
- Meath and the other counties in which primary income exceeded disposable income in 2011 (Dublin, Kildare and Wicklow) were also the counties with the highest employment rates as indicated in the 2011 Census.
- Self-employed income in Meath declined relative to the rest of the country during the recession, but there are indications that this trend predates the recession.
- Meath was the 9th most affluent local authority in 2011.

Disposable Income and Primary Income

Meath was one of only four counties in Ireland (the others being Dublin, Kildare and Wicklow) according

to the CSO data (in 2010 and 2011) where primary income exceeded disposable income. Primary income is the amount that households have to spend or save minus social welfare transfers, income tax and national insurance contributions. Primary Income includes employee income and self-employed income and is a better indicator of income performance for a county than disposable income.

These were also the counties with the highest employment rates as indicated in the results of the 2011 Census.

Self-Employed Income

One of the principal components of primary income is self-employed income, which also gives an indication of small business performance. Up to 2009, self-employed income per head was higher in Meath than in the country as a whole. In 2009, self-employed income per head in the State was on par with Meath and in the next two years the position of Meath deteriorated relative to the rest of the country. This suggests deterioration in the relative performance of the county's small businesses, not just in the wake of the recession, but over the longer period since 2000.

Regional Statistics (GDA)

3rd

highest ranked county by ratio of primary income to disposable income



9th

most affluent local authority area



47%

The GDA accounts for 47% of primary income



Disposable income per head is higher in GDA than State

Pobal HP Deprivation Index
Relative Score, 11

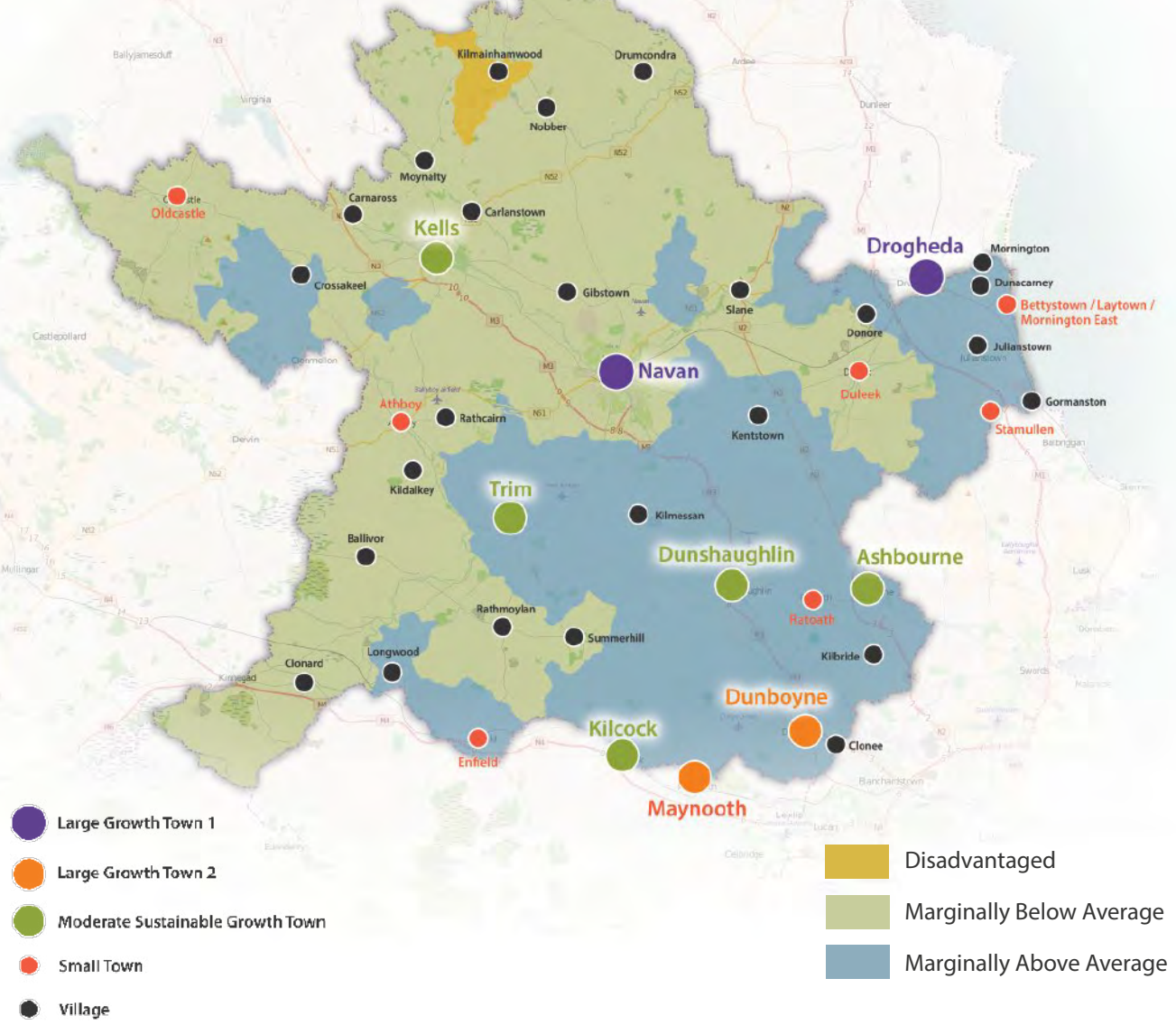


Figure 5: Summary profile of Income Performance and Affluence

Deprivation/Affluence and Related Indicators

Meath was the ninth most affluent local authority area according to the Pobal HP Deprivation Index in 2011, with a relative score of 0.9 (the most affluent local authority area was Dún Laoghaire Rathdown, with a relative score of 10.6, and the least affluent/most deprived was Limerick City, with a relative score of -6.7). The relative scores for the Dublin and Mid-East Regions were 3.7 and 1.5 respectively (within which Kildare and Wicklow had relative scores of 2.3 and 1 respectively). Most significant, however, is the change in the Pobal

HP Deprivation Index during 2006-2011, where it emerges that Meath witnessed the largest fall in relative affluence. Between these years, the relative scores for Meath fell by 1.8% which was the highest rate of decline of any local authority in the State. The fall in Meath's relative affluence during 2006-2011 could be seen as further indication of the pro-cyclical nature of the local economy.

EMPLOYMENT AND ENTERPRISE

Employment and Enterprise includes employment rate, employment by sector, number and type of enterprises (including indigenous and FDI companies).

Key Points

- Meath has an employment rate of 82% with 74,342 of its residents in employment.
- Within Meath itself there are 40,000 jobs mainly in traditional sectors such as Agri-food and Manufacturing.
- However, there has also been employment growth in newer sectors such as utilities, banking and financial services.
- While Meath has a strong base of indigenous companies, the FDI sector is not as well represented.

Employment patterns of people living in Meath

Data indicates 74,342 residents of Meath were employed (in Meath or elsewhere) in 2011. This level of employment was equivalent to an employment rate of 82%. Within Meath itself there were just fewer than 40,000 jobs. Of these 40,000 jobs, 28,449 jobs were held by Meath residents, and 10,373 jobs held by inbound commuters in that year.

Employment Sectors

An inspection of the figures for Meath indicates higher concentrations of employment in the following sectors:

- Agri-food and forestry – Meath is especially strong in agri-food (beef and dairy farming)
- Mining, quarrying and turf production – Meath benefits from a rich tradition in mining and quarrying.

- Manufacturing – Meath has a higher concentration of residents employed in manufacturing industries compared with Dublin and this could be an important source of differentiation for the county in the coming years.
- Transportation, storage and communications – reflecting Meath's favourable geographical location.

Employment growth sectors

In the years 2006-2011 there was also strong employment growth in the following sectors:

- Utilities – electricity, gas and water supply
- Wholesaling and retailing
- Hotels and restaurants
- Banking and financial services
- Public services – education and health as well as public administration
- Other sectors.

Socio-Economic Grouping of People Working in Meath

The following table also shows that there were proportionately more employers and managers among the inbound commuters to Meath compared with the State in 2011 (18.2% versus 15.8%) and about the same concentration of higher professionals (7.7% versus 8% for the State). A higher concentration of skilled manual and semi-skilled jobs in Meath compared with the State is also evident in the table as Meath boasts proportionately more workers in agriculture/farming compared with the country overall.



Broad Industrial Group	Meath		Dublin		Mid-east		State	
	Number	% Change	Number	% Change	Number	% Change	Number	% Change
Agriculture, forestry and fishing	74	2.00%	-38	-1.30%	115	1.30%	4,970	5.60%
Mining, quarrying and turf production	-157	-17.30%	-85	-24.60%	-307	-20.80%	-2,077	-26.80%
Manufacturing industries	-2,653	-26.10%	12,691	-25.60%	-7,195	-24.30%	-50,102	-20.60%
Electricity, gas and water supply	139	40.60%	882	26.10%	354	30.80%	1,826	16.20%
Construction	-6,214	-56.40%	-23,146	-55.40%	-16,064	-56.50%	-124,827	-58.00%
Wholesale and retail trade	883	8.10%	-246	-0.30%	2,098	6.60%	8,442	3.30%
Hotels and restaurants	527	18.00%	1,312	4.70%	711	7.40%	2,829	2.80%
Transport, storage and communications	267	5.40%	-3,261	-7.90%	-168	-1.30%	-8,136	-7.70%
Banking and financial services	543	15.90%	4,145	9.30%	1,489	13.90%	7,738	9.10%
Real estate, renting and business activities	254	3.80%	816	1.00%	600	2.90%	3,278	1.80%
Public administration and defence	643	14.80%	1,063	3.10%	1,297	9.90%	12,257	12.10%
Education	1,704	38.20%	10,894	29.70%	4,714	33.60%	36,252	28.40%
Health and social work	687	10.10%	4,682	8.50%	1,839	9.40%	12,160	6.40%
Other community, social and personal service activities	89	2.60%	1,488	5.40%	230	2.10%	4,307	5.40%
Industry not stated	-881	-19.80%	-17,982	-35.30%	-4,221	-29.30%	-31,599	-23.80%
TOTAL	-4,095	-5.20%	-32,167	-5.60%	-14,508	-6.40%	-122,682	-6.40%

Table 1: Change in the Composition of Employment in County Meath and Selected Areas 2006-2011

EMPLOYMENT PATTERNS IN MEATH



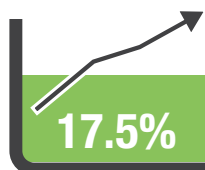
50% GDA contribution to total GVA



Almost 80% of Meath businesses are 'happy' or 'very happy' with being located in Meath.



57% GDA contribution to GVA of all services in State



growth in Irish owned agency assisted enterprise in Meath between 2010-2013



Almost 7,000 enterprises in Meath (2012)

FDI sectors in Meath

- Financial/services
- Software/computer services
- Medical devices
- Engineering
- Food processing
- Paper/paper products
- Parmaceuticals and plastics

Highest level of enterprise growth in **Finance and Insurance**

Socio-Economic Group	Co. Meath	%	Inbound Commuters	%	Total	%	State	%
Employers and Managers	4,230	14.9%	1,885	18.2%	6,115	15.8%	285,450	15.8%
Higher Professional	1,289	4.5%	800	7.7%	2,089	5.4%	145,446	8.0%
Lower Professional	3,856	13.6%	1,903	18.3%	5,759	14.8%	280,300	15.5%
Non-manual	8,324	29.3%	2,459	23.7%	10,783	27.8%	467,807	25.9%
Manual Skilled	2,415	8.5%	1,256	12.1%	3,671	9.5%	139,495	7.7%
Semi-skilled	3,066	10.8%	1,205	11.6%	4,271	11.0%	169,380	9.4%
Unskilled	891	3.1%	348	3.4%	1,239	3.2%	54,472	3.0%
Own Account Workers	1,377	4.8%	228	2.2%	1,605	4.1%	94,525	5.2%
Farmers	1,991	7.0%	80	0.8%	2,071	5.3%	76,975	4.3%
Agricultural Workers	436	1.5%	71	0.7%	507	1.3%	10,247	0.6%
All Others	574	2.0%	138	1.3%	712	1.8%	83,263	4.6%
TOTAL	28,449	100%	10,373	100%	38,822	100%	1,807,360	100%

Table 2: Socio-Economic Grouping of those at Work in County Meath by Place of Residence (2011)



- 40,000 jobs located within Meath
- 82% employment rate
- 36% of workforce are employers, managers or professionals
- 5,794 agency-assisted Irish-owned jobs in Meath

Top 5 Enterprise Sectors By Number



Top 5 Employment Sectors By Number of Employees



OUTBOUND COMMUTERS

An examination of the outbound commuters from Meath – namely those living in Meath but working outside the county

Key Points

- Commuting plays a far greater role in Meath than in any other county in Ireland (outside of the capital) with 54% of the working population or 33,000 people commuting to work outside the county.
- Of these, 41% or about 25,000 were working in the Dublin Region.
- Such is the extent of outbound commuting that there are almost as many people living in Meath but working in Dublin as there are living and working in the county (about 28,500 in 2011).
- These Outbound Commuters comprise a highly skilled workforce with high levels of educational attainment. At the last census in 2011, over 41% of the outbound commuters had third-level or higher educational attainment.
- Outbound Commuters represent a major talent pool for FDI companies investing in the county and are a key selling point for the county.
- The towns nearest Dublin have the highest number of commuters and the largest skills base in the county.

Extent of Outbound Commuting

The majority of people residing in County Meath are employed outside the county with 28,449 people at work within Meath (46.3% of the total) and 32,942 at work outside of Meath (53.7%). Proportionately speaking, outside of the capital, Meath has the biggest outbound commuter population of any county in the country.

Dublin is the main destination for Meath's commuters accounting for 25,008 of the 32,942 outbound commuters (over three-quarters of all outbound commuters in 2011) and absorbing 41% of all Meath residents at work in any location in that year.

In other words, there were nearly as many people residing in Meath but working in Dublin (c. 25,000) as both residing and working in Meath in that year (c. 28,500). After Dublin, the other main working destinations for Meath's outbound commuters in 2011 were Louth (3,270, 10%), Kildare (2,148, 7%), Cavan (905 or 3%) and Westmeath (713 or 2%).

Outbound Commuters Education and Skills

The level of education attainment of the outbound commuters is higher (41.3%) than those of residents working in Meath (25%) for third-level or higher educational qualifications. The level of educational attainment of outbound commuters to Dublin is even stronger - over 10,500 or 42.3% of the commuters to Dublin City and County (i.e. the Dublin Region or the four local authority areas of the capital) had third-level or higher educational attainment in 2011 (while 38% of the outbound commuters from Meath to other, non-Dublin places of work had such educational attainment in that year – the same as the State).

In addition amongst the population of Commuters were:

- 7,438 employers and managers, which exceeded the total number of employers and managers working within the county (6,115, comprising those both living and working in Meath and the inbound commuters falling into this socio-economic group).
- 2,859 higher professionals, which was greater than the total number of higher professionals at work in the county (2,089, made up of those both living and working in the county plus the inbound commuters in this group).
- 6,086 lower professionals, surpassing the total number of lower professionals working within the county (5,759, this being the sum of the people both living and working in Meath and the inbound commuters in this category).
- 9,620 non-manual workers, which was bigger than the total number of non-manual workers living and working in Meath (8,324).
- 2,886 manual skilled workers, which was larger than the total number of manual skilled workers living and working in the county (2,415).

A large number and proportion of the outbound commuters (namely 7,771 or almost 24% of all outbound commuters) were working in the key information and

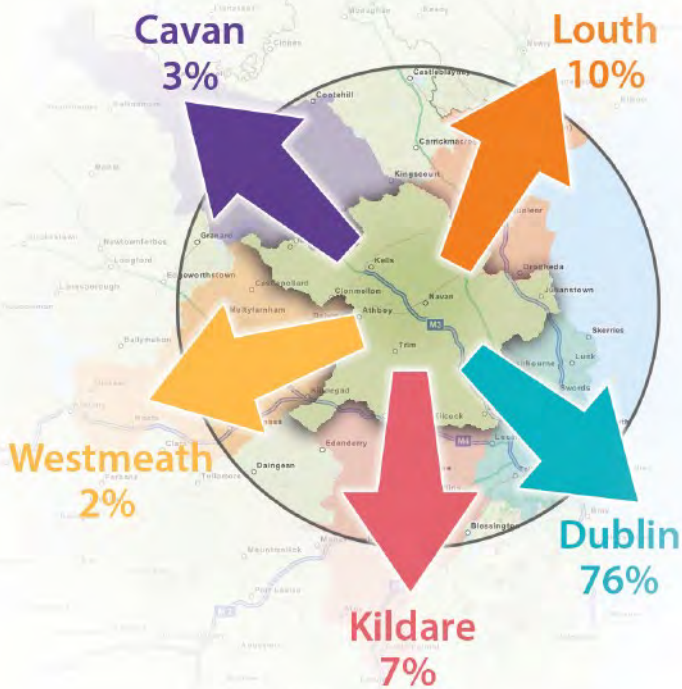


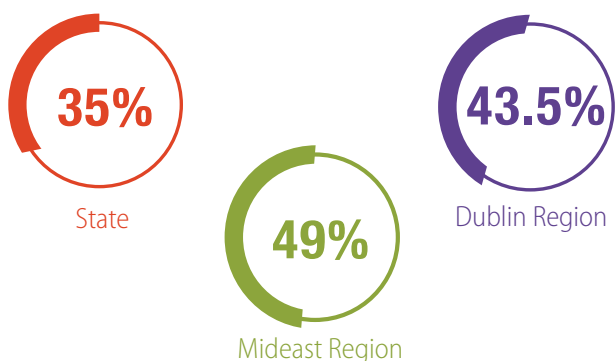
Figure 6: Outbound Commuters - Meath Residents and where they work (CSO Powscar 2011)

communication, financial, real estate, professional, administration and support service sectors in 2011, compared with 4,683 or 12.1% of all people at work in Meath in that year (both inbound commuters and those both living and working in Meath).

Outbound commuters are also younger. Substantially more of the outbound commuters (23,375 or 71% of the total) were aged 20-44 years compared with those both living and working in Meath in 2011 (16,849 or 59%), illustrating the favourable age distribution of the outbound commuters.

The towns within the county where the extent of outbound commuting is greatest (and thus where the skills are likely to be highest) are in the settlements closest to Dublin and in the M1 Corridor.

Regional Statistics (GDA) Outbound Commuter Flows



Extent of Outbound Commuting in Selected Settlement Areas in Meath

As part of the baseline study⁸ for this strategy, the composition of employment in nine selected towns in Meath was examined. These were Drogheda (South), Clonee, Ratoath, Dunboyne, Ashbourne, Dunshaughlin, Trim, Kells and Navan. In 2011, these 9 towns together accounted for 16,727 jobs or 43% of all employment in Meath.

Navan accounted for almost one-quarter of all jobs in Meath. The next employment centres were Trim, Kells, Ashbourne and Dunshaughlin. The Drogheda South Environs Development Boundary – termed ‘Drogheda (South)’ - accounted for a similar number of jobs as Ratoath. Some 62% of the jobs in Drogheda (South) in 2011 were accounted for by inbound commuters (i.e. 527 of the 845 jobs in that year). The corresponding proportion in Navan was just 16% and in the other towns varied from 14% in Trim to 28% in Ashbourne. However, the apparently high proportion of inbound commuters to Drogheda (South) reflects local geography and most of the jobs among inbound commuters are likely to have been held by residents from the Louth part of Drogheda and neighbouring Fingal.

The towns with the highest rates of outbound commuting were those closest to Dublin (spatially or transport connection-wise). Of the selected towns, only Navan had an outbound commuting rate lower than that for the county as a whole in 2011 (53.7%) but still the 46.1% observed for the county town is nevertheless high.

While commuting does provide jobs and income into the County, the high rate of outbound commuting is not without cost (e.g. time spent travelling on a daily basis and being away from family, friends and local communities). The challenge for Meath is to ensure a greater retention of economic impact within the county, which will contribute to people’s quality of life and support the goal of creating sustainable communities.

8 The Meath Economic Base Line Study, produced by Justin Gleeson of the All-Island Research Observatory (AIRO) and Dr. Chris van Egeraat of the Department of Geography NUI Maynooth shows the changes in economic activity in the county over the past 20 years plotting, inter alia, the growth in population, employment, infrastructure capacity, regional development, global economics, education, labour skills, research and development. - See more at: <http://airo.maynoothuniversity.ie/services-projects/socio-demographic-analysis/meath-economic-and-spatial-baseline-indicators#sthash.IgyvBmbg.dpuf>

EDUCATION

Education includes higher education infrastructure, qualifications and courses.

Key Points

- The country's top universities and institutes of technology, which account for 90,000 student or 45% of all students in higher education, are within easy commuting distance of Meath.
- These universities and IOTs account for almost 60% of the State's postgraduate students, 60% of all international students and 54% of all research grants in the country.

Higher Education Institutes (HEIs)

An assessment of school league tables⁹ provides data on college destinations from each county and therefore an indication of the main HEI's serving Meath. These include, in order, Dublin Institute of Technology 15%, Maynooth University 14%, Dublin City University 12%, Dundalk Institute of Technology 11%, University College Dublin 9%, Institute of Technology Blanchardstown 8%, Trinity College Dublin 7% and Athlone Institute of Technology 4%. These HEIs are all located around County Meath and the county can claim close geographical proximity to the HEIs (as being 'effectively located' in Meath, given excellent transport as well as proximity).

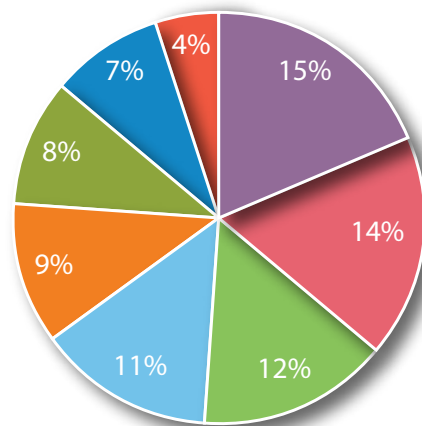


⁹ Based on the Irish Times school League Table (2012) a total of over 1,700 pupils in Meath sat the Leaving Cert Exam and 1,357 progressed to higher education study, meaning a progression rate of 80% in that year- around the same as the national figure.

The HEIs in the vicinity of Meath together accounted for over 90,000 students in higher education courses (undergraduate and postgraduate, full-time and part-time), representing a substantial proportion (45%) of the overall total for Ireland.

Within the total, the HEIs together made up 56% of all full-time postgraduate students (including at PhD and master levels) and 58% of all part-time postgraduate students in Ireland. Some other interesting findings include:

- 46 % of all international students and 66 % of EU students listed in full time HE courses were enrolled in the 8 HEIs in the vicinity of Meath. Meath is favourably located to the country's leading HEI's in respect of knowledge transfer performance.



- Dublin Institute of Technology
- Maynooth University
- Dublin City University
- Dundalk Institute of Technology
- University College Dublin
- Institute of Technology Blanchardstown
- Trinity College Dublin
- Athlone Institute of Technology

Figure 7: Summary Profile of Education - HEIs Serving Meath By Student Intake 2012 (%)

SKILLS AND TRAINING

County Meath offers a wide range of options for skills and training to people who want to improve their competencies and qualifications. As noted earlier, Meath Local Enterprise Office offers business information and advice, business skills training and mentoring support. Other skill and training options to support businesses include:

- Dunboyne College of Further Education offers a range of approved post leaving cert courses and pre university courses ranging from languages to law.
- The Louth Meath Education and Training Board (LMETB) is the local statutory education and training authority. It provides a wide range of services in second-level schools, PLC colleges, further education, adult education, community education, youthreach centres, vocational training opportunities scheme (VTOS), adult literacy, back to education initiative (BTEI), adult guidance centres, sport and other activities. The LMETB are also at hand to work with existing and potential companies in providing specific training programmes for staff.
- Meath Partnership and Meath Community Resources Company Ltd. offer a range of training programmes for Meath's small and micro-business sector. This includes offering a range of programmes that support entrepreneurship and enterprise creation, development and enhancement in high value added and innovative sectors.
- The National Learning Network (NLN) in County Meath provides a range of flexible training courses and support services for people who need specialist support (job seekers, unemployed, people with an illness or disability) in Meath. The SOLAS courses and HSE programmes, all of which include work experience, offer nationally recognised qualifications including QQI, ECDL, and City and Guilds ensuring that students are ready to get a job or go on to further education.

TOURISM AND HERITAGE

Tourism includes visitor numbers, revenue spend and accommodation.

Key Points

- Meath has a strong Tourism product with very significant development potential.
- Meath tourism is performing well and contributes €44m a year to the local economy. (Estimates from Fáilte Ireland suggest that every €1m in tourism expenditure supports 36 Full Time Equivalent (FTE) jobs).
- Revenue per visitor at €361 is significantly higher than the national average.
- Strengths include proximity to Dublin and good roads and transport infrastructure, plus a varied range of visitor attractions, from the very popular Tayto Park to some of the world's most important historical sites.
- Ireland's Ancient East offers Meath the opportunity to showcase its rich historic past.
- An issue may be the relatively low stock of hotel accommodation in the county which may serve to limit the extent of visitor stays and economic impact.

Meath has a very strong Tourism product with significant development potential including the UNESCO World Heritage site of Newgrange, Trim Castle (the largest Norman castle in Ireland), the Hill of Tara, the site of the Battle of the Boyne as well as successful modern visitor attractions such as Tayto Park.

Meath's Share of Overseas Visitor Numbers and Expenditure

In 2012, there were a total of 122,000 overseas visitors to Meath, representing 1.2% of the national total. Total revenue among the overseas visitors to the county was €44m or 1.5% of the National Total.

In terms of revenue per overseas visitor Meath performs very well, revenue per overseas visitor in Meath in 2012 (€361) was well above the figure for the State (€299) and was even higher than leading destinations such as Galway and Kerry.

Meath has a successful track record of hosting major sporting events such as the Solheim Cup at Killeen Castle in 2011. In 2014 the Giro d'Italia passed through the eastern part of the county which was a successful one-day event for the county and the eastern seaboard region.

Around the county, there are also various events and festivals throughout the year. The county is well-suited to niche tourism including short breaks and day outings.

Proximity to Dublin and good communication links mean that Meath is ideally placed to attract both domestic and international tourists.

It should also be noted that Fáilte Ireland's new strategy of marketing Ireland's Ancients East (see below) is tailor-made for Meath which boasts some of the most significant historic sites not only in Ireland, but in Europe and indeed the world.

The only limiting factor to the growth of tourism in the county is the lack of suitable hotel beds to cater for increased demand.

Meath Perspective: Tourism

Ireland's Ancient East

In 2015, Ireland's Ancient East was launched as Fáilte Ireland's latest tourism initiative to build on the wealth of historical and cultural assets in the east and south of Ireland.

The initiative offers visitors a personal experience of 5,000 years of history stretching from Newgrange and the Boyne Valley in the north east through the midlands all the way down via Kilkenny's Medieval mile to Waterford's Viking Quarter and Cork's cultural attractions. The new brand proposition is intended to match and complement the Wild Atlantic Way in terms of scale and ambition.

The initiative is aimed at two particular market segments overseas (identified by the research) who have indicated they would be more likely to come to Ireland for this kind of experience:

- The Culturally Curious - older visitors (over 45) want to broaden their minds and expand their experience by exploring new landscapes, history and culture.
- Great escapers - tend to be younger, early thirty-something's who want time out from their busy lives and careers to connect with history and nature and their place within.



The new initiative will be based on four distinct thematic pillars:

- Ancient Ireland - The Dawn of Civilisation- e.g. the prehistoric attractions of the Boyne Valley (Newgrange, Knowth)
- Early Christian Ireland- e.g. Abbeys and Cathedrals
- Medieval Ireland- e.g. Trim Castle
- Anglo Ireland – e.g. Great Houses and Gardens

Boyne Valley

The Boyne Valley forms part of Fáilte Ireland's national destination strategy. The Boyne Valley draws together the tourism industry of south County Louth and County Meath. Since 2012 Meath and Louth County Councils have a unique approach to tourism whereby both councils have been working together to jointly market and develop the Boyne Valley as a tourism destination. They have a dedicated Boyne Valley Tourism Development Officer who works closely with the relevant agencies and sectors to promote and develop the destination.

The Boyne Valley destination as a strategic approach has been hugely successful in terms of raising awareness of County Meath as a leisure destination. The Boyne Valley Tourism Strategy 2012-2014 oversaw the initial development of the Boyne Valley Destination in three phases. This included the completion of the 225km Boyne Valley Drive signage project, the development of the Boyne Valley Guide and language guides and with phase three almost complete, the Boyne Valley Drive website was developed in 2015 and the Boyne Valley App and Audio Guides were also developed in 2015.

Increasingly, tour operators and the travel trade are seeking to ensure more groups overnight in the area. This is due to the collective marketing approach by Meath and Louth County Councils, Fáilte Ireland and the tourism trade combined with location, the availability of newer quality hotel stock, rising hotel rates in Dublin and the innovative tourism offerings. Furthermore, the tourism trade has developed alliances based on the Boyne Valley destination including the Boyne Valley Food Series, the Boyne Valley Garden Trail, Boyne Valley Links Golf and more recent alliances are the adventure providers, licensed vintners and the Boyne Valley Golf Classic.

Now with the launch of Ireland's Ancient East destination, the two councils, partnering with the main stakeholders and tourism trade aim to maximise the opportunities that this presents. The Boyne Valley fits perfectly with the four new themes of Ireland's Ancient East: Ancient Ireland, Medieval Ireland, Early Christian Ireland and Anglo Ireland. 16.5million people globally have been identified as being 'warm to visiting Ireland'. Consequently, the introduction of Ireland's Ancient East presents many new opportunities for the Boyne Valley destination and its stakeholders. Meath and Louth County Councils have set up a Boyne Valley Strategy Working Group with representation from the tourism trade and relevant bodies across both counties with the purpose of overseeing the preparation of a new strategy to guide tourism development during 2016-2020. This strategy has as its core objective the aim of making the Boyne Valley a leading tourism destination over its 5 years.



Attraction	2008	2009	2010	2011	2012	2013
Tayto Park	-	-	5,000	334,000	391,000	435,000
Brú na Boinne - Newgrange	133,524	130,083	122,785	132,760	132,649	133,616
Trim Castle	62,314	61,240	59,416	59,127	67,795	48,179
Battle of the Boyne Site	46,262	41,799	40,334	38,846	62,004	60,796
Brú na Boinne - Knowth	58,351	51,941	49,414	51,962	54,350	51,138
Brú na Boinne - Visitor Centre	44,437	40,406	37,071	43,828	42,481	44,990
Red Mountain Open Farm	-	6,000	8,000	17,000	19,250	17,000
Hill of Tara	13,386	11,491	12,878	11,628	9,143	9,600
Loughcrew Gardens	8,022	7,857	7,340	7,491	7,224	9,226
Columban Mission Awareness Centre	7,000	7,000	5,000	5,000	5,000	4,000
TOTAL	373,296	357,817	347,238	701,642	790,896	813,545

Table 3: Leading Visitor Attractions in County Meath (2008-2013)

Source: Fáilte Ireland, consultancy team analysis.

Visitor Attractions

Table 3 shows the total number of visitors to Meath's main attractions during 2008- 2013 (visitors include domestic and NI visitors as well as overseas visitors from outside the island of Ireland).

Noteworthy is the very rapid growth in visitors from 2010, coinciding with the opening of Tayto Park near Ashbourne. As a result of this new development, visitor numbers have grown by 21% year on year, with the number of visitors to Tayto Park being 435,000 in 2013 and ranks in the top 10 of the country's visitor attractions. Tayto Park is currently in the process of a major expansion and Ashbourne Chamber of Commerce is hoping to establish a tourist office in the town to capitalise on the influx of tourists to the park. It is also seen in the table that the Battle of the Boyne site at Oldbridge did well in 2012.



Figure 8: Summary Profile of Tourism

Regional Statistics¹⁰



772,000
visitors to region



€286.9m
visitor revenue

¹⁰ County Meath forms part of the Midland East Region regarding tourism statistics gathered by Fáilte Ireland. Figures shown are for 2013.

INFRASTRUCTURE

Physical infrastructure such as transport, water energy and broadband to support economic development.

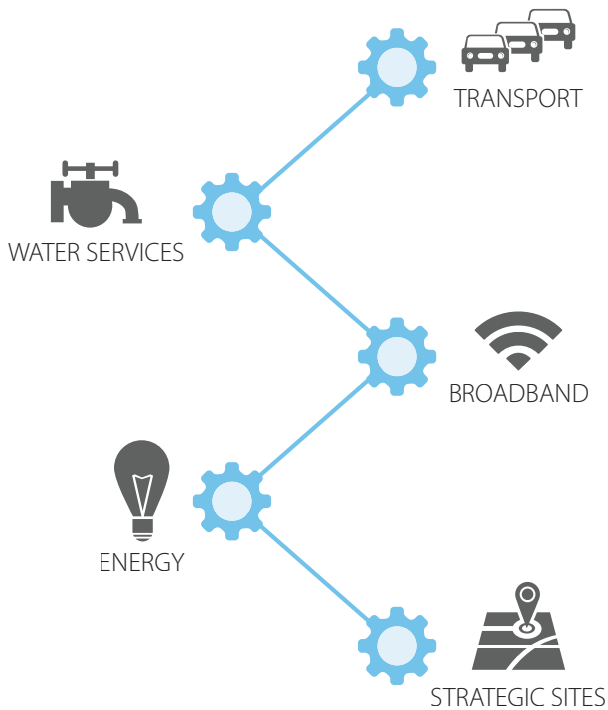


Figure 9: Summary Profile of Infrastructure

Transportation

The investment in transportation infrastructure has provided a very good basis for promotion of Meath as an excellent location to develop employment opportunities. The motorways and national roads traversing County Meath (M1, M2/N2, M3/N3 and M4/N4) and connections with the M50 Dublin orbital route offer ease of access to national and international markets. There has also been significant investment in rail infrastructure with new train stations and rail services to Dublin City Centre.

The existing investment in transportation has put Meath at a unique competitive advantage by virtue of its:

- Strategic location within the fastest growing region of the country - providing access to large labour pool and skills base to meet employer needs.

- Proximity to the Dublin Metropolitan Area (with motorways and national roads traversing County Meath including M1, M2/N2, M3/N3 and M4/N4) - ease of movement of people is important for the service sectors.
- Proximity to Dublin Airport and Dublin Port - important for freight dependent industries such as manufacturing and agri- food.
- Location within the Dublin-Belfast economic corridor - established and branded international business corridor facilitating access to markets.

Planned investment to support business and lifestyle choices includes:

- Interconnections between the national road network, public transport, freight, tourist attractions and key business sites within Meath.
- Continued maintenance of the road network to support economic activity across a range of sectors.
- Ambitious Green Transport Initiatives – with 3 greenways being developed and plans to develop over 460km of cycleway within County Meath¹¹, linking to the wider city region.

Water Services

In the decade preceding the establishment of Irish Water, significant investment had been made by Meath County Council (with substantial assistance from the national exchequer and the EU) in upgrading and replacing essential water and wastewater infrastructure throughout the county.

Although there is still a need for further capital investment over the coming years, the very extensive water services infrastructural improvements realised during the past decade, coupled with the considerable success the Council has had in the area of water conservation, means that the county is well placed to facilitate and support employment generating development from a water service perspective.

In 2014 Irish Water became the national, public water utility and they have responsibility for all water

¹¹ National Transport Authority Cycle Network Plan for the Greater Dublin Area 2013

services assets (infrastructure) including future capital investment. Meath County Council works closely with Irish Water to continue to optimise the capacity attainable from existing assets and also to secure the capital investment that will be required over coming years to cater for a range of industries from 'big wet' industry to office development.

Broadband

Broadband provision is central to business growth. FDI is attracted by a connected society while SMEs increasingly require reliable broadband (Meath Local Enterprise Office offers a range of supports to encourage e-commerce such as Online Trading Vouchers¹²). There has been significant investment in broadband infrastructure, however there has also been increasing demand on the network, for example, by the convergence of home entertainment with online platforms. It is also evident from the national broadband programme that pricing, performance and availability remain central issues to be addressed at a national level.

It is envisioned that a combination of commercial investment and state led intervention will provide at least 30mbps to all premises in Ireland over the life of the Plan, with future proofing. County Meath has already positioned itself at the forefront of this space, firstly with MANs¹³ and then with fibre-to-the-business services¹⁴ in Kells, Trim, Dunboyne and Navan, with the latter being one of Irelands first Gigabit towns or "fibrehoods". However, there is more work to be done in villages and rural areas and Meath County Council is actively working with relevant state agencies and network operators to do this by exploring options around:

- Re-use of infrastructure – e.g. towers, buildings, poles and telecom standard ducting.

- Regulation e.g. road opening licences, planning permissions and rights of way.
- Engagement with industry and being pro-active with the industry players around local issues of connectivity and coverage.

Energy

The County is served by a range of energy sources and has been investing heavily in infrastructure and innovation in recent years and encourages the sustainable production of energy from renewable resources to ensure that business and nature can be productive together.

A number of gas mains traverse the County and Meath is well served with gas transmission lines. In terms of electricity supply, the East West Interconnector (EWIC) is a high-voltage underground power cable which links the electricity transmission grids of Ireland and Great Britain (between Deeside in north Wales and Woodland, County Meath). It is one of the largest High Voltage Direct Current schemes in the world to use Voltage Source Converter technology. This offers greater security of supply in Ireland and Great Britain and increased competitiveness.

Regarding innovation, Indaver Ireland Ltd joined other electricity generators such as ESB and Bord Gais in the electricity market. Indaver's waste-to-energy facility in Duleek, County Meath, is converting waste into energy and exporting it in the form of electricity to the National Grid. This contributes to Ireland's security of energy supply and decreases the amount of fossil fuel needed in the country. The Meath facility exports approximately 16MW of electricity, per year, which equates to the energy use of 20,000 homes.

Future investment is planned by Eirgrid, the state owned electricity operator, in Meath to reinforce the network under its Grid 25 Strategic Investment Plan.

¹² To support small Irish businesses to enhance their online trading presence online trading vouchers were made available under the National Digital Strategy to be used for, amongst other things, the development or upgrade of an e-commerce website, purchase of Internet related software, online advertising, app development and training/skills.

¹³ Metropolitan Area Networks (MANs) is a local fibre network. A central objective of the MANs project was to provide a high-quality metro or middle-mile network that would provide high-bandwidth capacity to authorised service providers.

¹⁴ Enet initiated a project entitled 'fibredirect' to terminate fibre within business premises, in essence creating last-mile fibre access infrastructure or a 'Fibre To The Business' (FTTB) network.

Strategic Sites and Workspaces

County Meath has over **900** hectares of lands zoned for employment use aimed at facilitating a range of businesses in a flexible manner, from high technology zones to general employment. The size and scale of these areas also caters for a variety of people and product based economic activities, strategically located close to the national transport road and rail networks.

The County offers a range of business space from hot desk and small commercial buildings for sole traders and start-ups, to succession buildings (for offices, product development and manufacturing) for SMEs and large scale business parks and units for land hungry development such as data centres, logistics and distribution.

Meath County Council is continually looking at how it can help develop succession planning options to meet market demand. It is working with a range of agencies to explore options for advance property solutions to meet future demand.



QUALITY OF LIFE IN MEATH

High quality housing

- Meath offers a range of housing choices from modern urban houses and apartments to the traditional cottage in the countryside. Our competitive advantages include average asking prices more than €100,000, or 38%¹⁵, cheaper in Meath than Dublin for a 3 bedroom semi-detached house.



Range of Services

- Vibrant Town centres offering something for everyone no matter what interest, food, age, etc. with brand name shopping alongside traditional independent traders.
- 117 national schools – the highest number in the Mid-East Region and 2nd highest in the Greater Dublin Area.
- A range of post primary schools, including boarding/private options, and Dunboyne College of Further Education which offers a range of post leaving cert courses (level 5/6 FETAC).
- Broadband including Navan as one of Irelands first Gigabit towns or “fibrehoods”.

¹⁵ Based on housing data figures for 2015.

- Congestion free travel, with access to all major cities and towns via a combination of rail and national motorway network.

Good for your Health

- Hospital and variety of health service provisions including community care and family support services.
- Higher life expectancy than national average and lower Potential Years of Lost Life (PYLL)¹⁶.
- Over 90% of the population in Meath reported having 'good' or 'very good health' in most recent CSO surveys.



Active Communities

- Residents of Meath, whether existing or new, have access to a choice of over 350 registered community, social and environmental groups to cater for all interests and local projects.
- County Meath caters for all age groups at the grass root level. The Meath Age Friendly County initiative seeks to engage older people and all citizens in making their communities better, healthier and safer places for older people to live and thrive, while

a range of youth cafes and youth clubs serve the younger cohort.

- In total there are 199 childcare services in County Meath with average childcare service costs being 8.5% cheaper in Meath than in Dublin.

Vibrant Town Centres

Meath offers many vibrant centres of commerce, which are also engaging civic and social focal points. Maintaining, improving and supporting the role of town centres is core to achieving sustainability and offering the public a healthy mix of local businesses, entertainments, leisure, etc. Navan has been awarded the prestigious Purple Flag status for its evening and night-time economy. Purple Flag is a town and city centre award – similar to the Blue Flag for beaches – which aims to raise the standard and broaden the appeal of town and city centres between the hours of 18:00 and 05:00. Towns awarded the Purple Flag are recognised for providing a vibrant mix of entertainment while promoting the safety and wellbeing of visitors and local residents.

Unique Culture

The Meath Gaeltacht¹⁷ consists of two adjacent villages of Ráth Chairn and Baile Ghib, near to the town of Navan and is the only Gaeltacht area in the east of the country. It is the smallest Gaeltacht area in Ireland, encompassing a geographical area of 44km² (1 % of total Gaeltacht land area) and has a population of 1,771 (1.7% of total Gaeltacht population). Economic activities in the Meath Gaeltacht include engineering and food manufacturing.

Meath has a vibrant and diverse pool of artistic talent including artists, art groups, theatre groups etc. and a specifically designed and dedicated Art Centre in Navan with 320 seat theatre, visual art exhibition space, studios and workshop spaces and cafe-bar facilities.

¹⁶ PYLL is a summary measure of premature mortality due to deaths before 75 years of age and can be used as an indication of the health of the population – lower PYLL means less premature deaths and a more healthy population.

¹⁷ A Gaeltacht is a region where Irish is spoken as the communal language of the local population.



Sporting Traditions

County Meath is synonymous with the bloodstock industry and horseracing. It is therefore no surprise that the county has four renowned racecourses, alongside its offering of equestrian schools and stables. The County also boasts 16 Golf Courses, an International baseball centre, GAA centre of excellence and a dedicated Outdoor Activity Park designed to suit adults and people with disabilities. Meath also has 59 GAA clubs, 18 Athletic clubs, 6 rugby clubs and an array of other clubs dedicated to outdoor pursuit activities - from fishing, swimming and trail walking to the more adventurous activities of sand yachting and sub aqua diving.

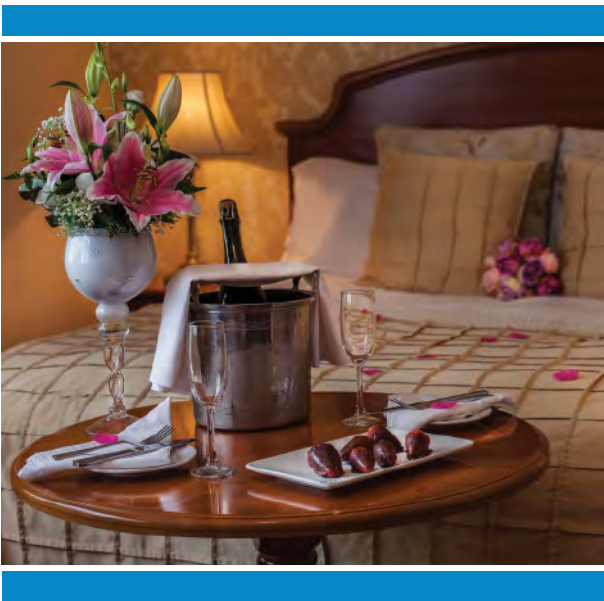
Rich Natural Environment

County Meath is home to Brú na Bóinne, deemed a world heritage site in recognition of its outstanding universal value. The scale of passage tomb construction, the important concentration of megalithic art as well as the range of sites and the long continuity of activity were cited as reasons for the site's inscription. The Brú na Bóinne tombs, in particular Knowth, contain the largest assemblage of megalithic art in Western Europe. The county also has a rich and varied collection of waterways consisting of coastline, rivers and lakes, including the Royal and Boyne navigational canals.

A Place to Relax

The County offers a range of accommodation from historic estate hotels to more contemporary buildings. In addition to catering for social events, they also offer business and conference facilities to cater for any size of event. Meath also has a range of family attractions with Tayto Park being very popular. Other attractions include indoor and outdoor activity centres, adventure centres, open farms, cinemas and large selection of play parks and walking and cycling trails.

The County is also well known for the quality of its food and has a strong network of Artisan Food Producers as well as large scale food companies. The county is rapidly building a reputation as a food heritage region turning out distinctive foods from the landscape and natural larder. It is also host to a number of food festivals, including the Boyne Valley Food Series and the Taste of Meath to showcase this distinctiveness.



Why Meath is a great place to locate - what the Companies say



Meath was an ideal choice for the site of the new European hub because of its proximity to Dublin airport, Dublin city and many national universities. It is also unique in that it is home to a fantastic agricultural heritage which makes for an excellent talking point for foreign visitors who are consistently impressed by the fabulous green landscape. The facility, opened on a 120 acre site, has been a major centre for Alltech's European operations from its inception, and has continued to grow to meet the needs of the region. The facility is located near many of Ireland's internationally renowned universities with which the company has strong ties. This has ensured a steady flow of expertly qualified graduates into the centre. This is essential as some of the most fundamental research that Alltech conducts takes place in the European Bioscience Centre in Dunboyne, Co. Meath.



Conveniently located in Dunshaughlin, we are well positioned to service our clients in our Dublin Network and Nationwide. Dunshaughlin has the added bonus of being easily accessible to motorways North and South, Dublin Airport and Dublin Ports.

Creating a balance between work and life has been a key component to Brochure Broker and its success. The flexibility of working locally eliminates long commutes and allows our staff to experience the luxury of easy access and lots of parking. Dunshaughlin offers all the requirements to run a business with a bank, post office depot, shops, couriers and many other businesses in Dunshaughlin Business Park.

We are very happy to recommend Dunshaughlin as a premier business location.



ECAS, the national Emergency Call Answering Service, was established in 2010 to process all emergency service requests from the public. To date it has answered in excess of 12 million 112/999 calls and texts in contact centres operated by BT Ireland on behalf of the Department of Communications, Energy & Natural Resources. BT invested more than €10 million in the service and 70 jobs have been created in three operator centres in Navan, Co. Meath, Ballyshannon, Co. Donegal and East Point Business Park, Dublin.

From the start, Johnstown Business Park, Navan has been the ideal location for a contact centre. The environment of the business park is well managed and pleasant to work in. The quality and availability of telecommunications capacity was a key selection factor in the location and the centre has enjoyed 100% service availability from the beginning. Most of our staff reside in Navan or in surrounding areas. Even those few who live further away commute primarily using the M3 and enjoy easy access into the Johnstown Business Park from Junction 8.

BT worked closely with Meath County Council in setting up the ECAS contact centre in Navan and our collaboration has produced great results for our business, our staff and for the public that we serve all over Ireland.



Epicom Food Ltd., headquartered in the Meath Enterprise Centre in Navan, was founded in 1999 as a packaging solutions company. In 2003 we became involved in manufacturing ambient dry food products for the retail market on behalf of our customers. As a progression from this, in 2012, we developed our New R & D/Product Development Division and assist customers with raw material sourcing, packaging design and development, process development, quality control and product launch. Last year we started pursuing international markets by developing individual products tailored to the needs of specific international customers.

We also have branches in Longford and Dublin and currently employ approximately 300 people throughout the three sites.

Epicom chose the vibrant town of Navan as its head office due to its excellent transport infrastructure and telecommunications together with its close proximity to Dublin City, Dublin Airport and Dublin Port. County Meath itself provides excellent training and educational opportunities and this ideal location allows us to attract highly qualified and motivated people with the relevant skills which are critical to our company as we expand our activities.



Images courtesy of Epicom. All rights reserved.



Facebook has confirmed it will proceed with the construction of a new data centre in Co Meath. The €200 million centre, which is planned for a site in Clonee, Co Meath will come on-stream by early 2018 at the latest. The company intends to build an initial 31,000sq m facility on the site, with planning permission for a second building already granted. The project is expected to support about 2,000 jobs during the construction phase.

Facebook CEO Mark Zuckerberg: *"We're glad to be investing in Ireland, to become a part of the Clonee community, and to continue building the massive infrastructure that connects our global community. Clonee Data Center will be one of the most advanced and energy efficient data centres in the world. It will feature the latest server, storage and network designs developed through the Open Compute Project, and will be powered by 100 per cent renewable energy."*

"Ireland has been home to Facebook's international headquarters since 2009 and we're excited to be investing further here," said head of Facebook Ireland Gareth Lambe.

"We want to innovate in Europe and for Europeans, and the Clonee data centre will house some of the big breakthroughs Facebook has made in this area. Like its predecessors, this project will generate hundreds of millions of euros in economic activity and support hundreds of jobs in the local community."

"There's an ongoing need for more infrastructure capacity. It [the Clonee site] is excellent from a construction point of view. It's pretty much shovel ready, with a really good power and network infrastructure" said Niall McEntegart, Facebook's director of datacentre operations for EMEA and APAC.



Images courtesy of Facebook. All rights reserved.

Coca-Cola International Services

Coca Cola International Services, located at the Southgate Campus, Dublin Road, Drogheda, County Meath provides professional and innovative services, solutions and governance to Coca Cola operations across several continents.

More than 220 people are employed here in skilled positions in areas such as Finance, Supply Chain, IT (Business Systems), Legal, Human Resources and Public Affairs & Communications.

The capability, efficiency and commitment of the team in Drogheda has enabled the Company to position Ireland and Drogheda as a good place to do business and has resulted in the Drogheda operation taking on a wide range of global and regional activities.

Muhtar Kent, Chairman and CEO of The Coca Cola Company, said, *"The Coca Cola brand has been in Ireland for more than half a century and our long history here gives us continued confidence in the strength of the Irish workforce, the commitment of the Irish government and the know how of Irish people to support our business."*

Coca-Cola International Services are active members of the local community, having operated in the town of Drogheda for over 40 years. The Company annually sponsors and supports over 70 different community events in the areas of amateur sports, arts, environmental projects, education and community welfare.

GENERALI

Generali, one of the leading players in the global insurance and financial markets, has had a presence in Navan since 1999. Three Irish based subsidiary companies employ over 200 people and are based in the scenic surroundings of Navan Business Park, Athlumney, Navan, County Meath.

Mr. Paul Gillett, CEO of Generali PanEurope commented on the attractiveness of the location, *"Our business is varied and specialised, so having a location that allows us to attract well-qualified people with the relevant skills is critical as we continue to expand our activities. We were delighted when the Generali Group chose Navan for the establishment of our new company Generali Link last year and we see this as a strong endorsement of the business environment, local infrastructure and strategic location that Navan offers"*.



Strengths



The Economic Profile of Meath clearly shows that the county has a great many strengths on which it can build a more prosperous and sustainable future. Meath possesses excellent demographics having a:

- Large and growing population – one of the fastest growing parts of Ireland during the period 2006-2011.
- Relatively high proportion of young people/children for future labour supply.
- Comparably low old age dependency rate.

Meath has one of the highest Labour Force Participation (LFP) rates in the country (65.8% versus 61.9% for the State in 2011) and unemployment is falling in the main urban centres.

Overall Meath is also a prosperous county and is:

- One of only four Irish counties where primary income exceeds disposable income.
- The third highest ranked county by the ratio of primary income to disposable income in 2011 (after Dublin and Kildare).
- Meath and the other counties in which primary income exceeded disposable income in 2011

(Dublin, Kildare and Wicklow) were also the counties with the highest employment rates as indicated in the 2011 Census.

- Meath was the 9th most affluent local authority in 2011.

Meath also has a strong well-developed indigenous enterprise sector and a less developed but growing FDI sector:

- Meath has an employment rate of 82% with 74,342 of its residents in employment.
- Within Meath itself there are 40,000 jobs mainly in traditional sectors such as agri-food and manufacturing.
- There has also been employment growth in newer sectors such as utilities, banking and financial services.

All of these factors make a strong contribution to Meath's quality of life. Meath's location means that its citizens enjoy access to all that is best in urban and rural living, while enjoying lower property prices than their neighbours in the capital.

These strengths give Meath a very strong platform on which to build a sustainable economic future for the county.

Meath has of course some challenges which it needs to address. The long-term decline in self-employed income in the county needs to be addressed, as does the concentration of employment in more traditional enterprises and in the public services within Meath.

The opportunities facing Meath however are far greater than the challenges. Meath is economically outperforming other regions and has the potential to continue to do so in the short and medium term.

The new regional Aid Map, which includes Kells and the north of Meath offers scope to create a uniquely

attractive investment offering for FDI companies (and improved supports for local companies).

As mentioned above Meath's highly skilled commuter population is a significant asset and represents a major opportunity as a resource for inward investment.

There are of course, threats to Meath's economic future, these include global macroeconomic trends, poor strategic execution of the strategy and infrastructure blockages or delays. However, these can and will be managed.

8


of the country's top universities and institutes of technology, which account for

90,000

students or

45%

of all students in higher education, are within easy commuting distance of Meath



These universities and IOTs account for almost

60%

of the State's postgraduate students,

60%

of all international students and

54%

of all research grants in the country

Education

Location and Proximity to Dublin

 Location within the Greater Dublin Area & along the Dublin-Belfast economic corridor

 4 Primary Motorways traversing County Meath (M1, M2, M3 & M4)

 Proximity to Dublin Airport and Dublin Port (Average 30 minutes travel time)

 Rail services operating to Dublin City Centre from Dunboyne





Quality of Life

HOUSING OPTIONS

30% savings on purchasing / 47% savings on renting compared to Dublin

TOURISM

Located within Ireland's Ancient East & Boyne Valley (Fáilte Ireland's Top 10)

Strategic Location of Business Parks and Commercial Sites

INCLUDING

KELLS
Regional Aid AREA



Two IDA Business and Technology Parks (Navan and South Drogheda)

Strategic Sites located in Dunboyne, Ashbourne and Kells

Regional Aid Opportunities providing funding to companies locating in Kells

Sectoral Opportunities

As highlighted earlier, the composition of employment in Meath shows that the county has relative strengths (compared with the State) in a number of sectors, namely:

1. Agriculture, forestry and fishing;
2. Manufacturing, mining and quarrying, electricity, gas, water supply and waste management;
3. Wholesale, retail trade, transportation and storage, accommodation and food service activities;
4. Public administration and defence; compulsory social security; and
5. Education, human health and social work activities.

More specifically, Meath is strong in primary agriculture, strong in mining and quarrying, and in certain manufacturing industries, like cement production, engineering and food production. It also has strengths in transport, logistics and storage, by virtue of its favourable location and proximity to the country's main infrastructure, including Dublin Airport and Dublin Port and strong tourism product by reflecting the opportunity on Ireland's Ancient East.

Employment in the public sector is likely to remain constrained during the medium-term (nationally as well as in Meath) due to fiscal policy.

The following sub-sectoral and cluster opportunities for Meath are based on a comprehensive framework that includes the range of economic sectors grouped into four categories, as shown in Figure 11.

The framework reflects previous work on enterprise development by Forfás and DJEI and represents a rounded and relevant approach for thinking about the specific employment opportunities for Meath over the coming years.

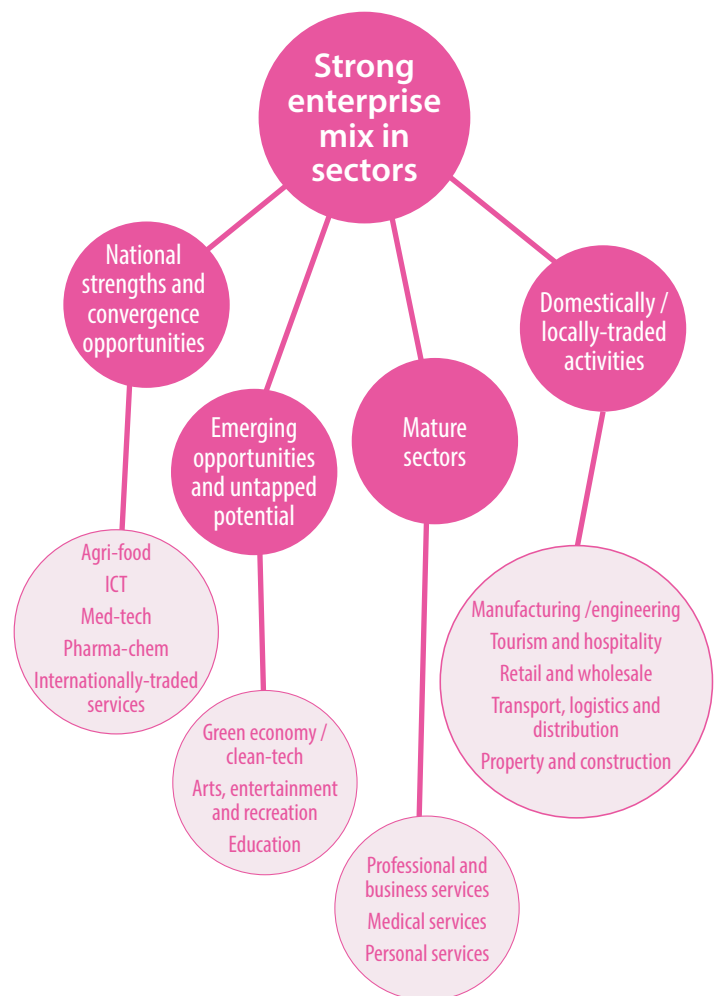


Figure 10: Framework for Sectoral and Sub Sectoral Employment Opportunities in Meath

SUB- SECTORAL OPPORTUNITIES

Agri-Food

Agri-Food is a key indigenous sector and Meath has a very well developed farm sector, due to the high quality of the land, but there is scope for employment growth in processing and manufacturing. Strengths include climate, land quality, provenance and reputation for quality and significant investment. Risks include farm demographics, dependence on existing markets, market risks for example, Russian boycott of EU farm products and weak demand in China. Opportunities

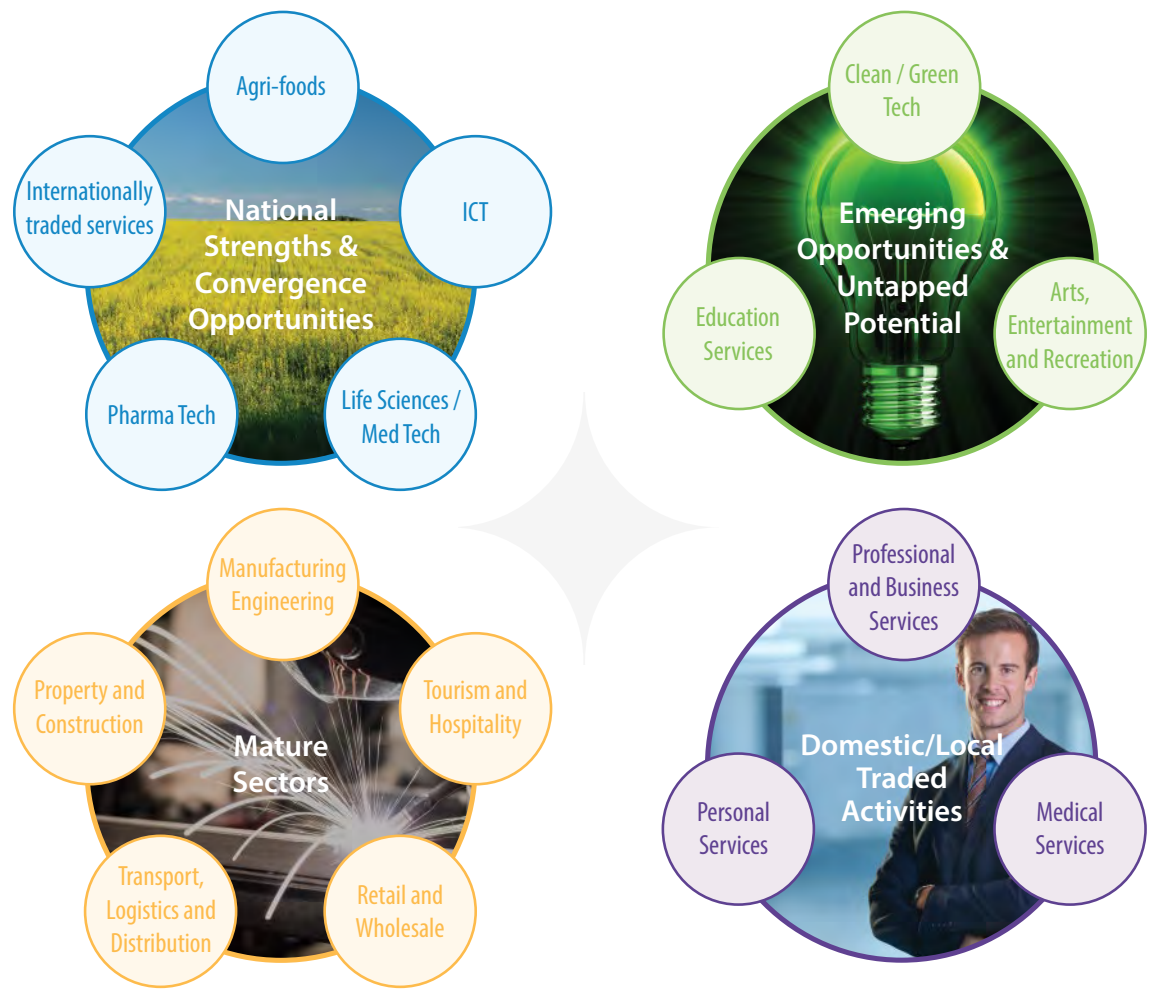


Figure 11: Sub sectoral Opportunities

include world population growth, consumer market for organic products and the ending of milk quotas. Given the mature development of the Farm sector, the key focus for the strategy should be on manufacturing and processing to maintain the existing share of employment in the sector.

The Food Sector is a strategic priority both for Government and Meath County Council. One key initiative for the county is the development of the Boyne Valley Food Hub which will seek to accelerate business innovation and research in the region by fostering the establishment of collaborative partnerships between local and national government agencies, academic / research institutions and the companies, large and small, that have ambitions for growth in the ever expanding global food markets. The Boyne Valley Food Hub project will be coordinated and driven by Meath Enterprise in conjunction with Meath County Council and in partnership with several key stakeholders. The strategic

objective of the project is to establish the region as a major national and international 'food start-up hub' by 2025 and to become recognised as a global model for regional economic development.

ICT

ICT is still a rapidly growing sector with most of the employment growth in software and social media companies. Ireland has a strong international reputation for ICT with most of the major global brands having a significant presence in Ireland. Risks include skills shortages. Opportunities include convergence with other sectors for example eHealth, Fintech and so on. The challenge for Meath is to promote itself aggressively as a cost competitive location with high skills availability. The target for the strategy is to maximise employment growth among these living and working in the county.

Med Tech

This is a well developed sector with a strong multinational presence. The research base has been growing strongly and Ireland is now a world leader in biotechnology, nanotechnology and materials science. Risks include competition for FDI in the sector and growing skills gaps are emerging. There are opportunities for expansion including bio-engineering and eHealth. There are strong prospects for growth in Ireland but most likely in city areas. However, Meath already has a major Med Tech company, Altech, which could attract in other firms.

Pharma-Chem

This is a sector in which Ireland has a well established international comparative advantage. There are opportunities, particularly in bio-pharma but growth is most likely in existing industry centres.

International Financial Services

Ireland has a very strong reputation in financial services with a focus largely in investment administration, banking and capital markets. There are opportunities in risk analysis, data security, information management and green financial products. Risks or barriers include labour costs and skills shortages. Meath has strong prospects for employment growth in this area due to its favourable location, infrastructure and skills and the presence of existing companies in Meath. The strategic aim is to maximise employment growth among those living and working in Meath.

International Business Services

Ireland has a strong reputation in shared services. Dublin is ranked 7th in the world for Shared Services. Risks include labour and rent costs as well as skill shortages in key areas. However, given its favourable location its skills, infrastructure and cost competitiveness vis-à-vis Dublin, Meath is well placed to maximise employment growth including the development of world class data centres for example Facebook. The target for the strategy is to maximise employment growth among those living and working in the county.

Engineering/Manufacturing/Mining

Meath has a relatively large share of this sector in Ireland and practical skills and know-how have developed over many years. However, the sector has challenges including highly competitive markets. The key to success for this sector is a focus on exports. Given its traditional strengths in this area Meath is well placed to sustain employment growth in this sector.

Tourism and Hospitality

This is a resilient sector in Ireland and a long standing source of service export earnings. High costs during the Celtic Tiger undermined Ireland's Tourism offering but the Tourism sector is now more competitive. The Global Tourist market is projected to grow at 4% per annum between 2011 and 2021. Meath is strongly positioned to develop as a major Tourism Centre given its location and rich heritage for example the Boyne Valley and Newgrange. However, there is a need to develop more high quality hotels in the county particularly in Navan, to take full advantage of national marketing initiatives such as Ireland's Ancient East.

Retail and Wholesale

This is a large sector employing over 270,000 people nationally. Domestic demand has been muted due to the recession. There is an opportunity to attract in multinational retailers by relaxing the retail planning guidelines but this opportunity needs to be balanced against the negative impact of out of town retailing on existing communities. Growth in this sector will be slow and steady in the medium term.

Transport Logistics and Distribution

This a large sector employing 90,000 people, numbers employed in the sector fell during the recession as its growth tends to track the overall economy very closely. Given current growth rates the sector is expected to grow significantly over the next number of years. There is also a possibility of development of port and logistics in and around Bremore deep water site which could also spur additional FDI. Given its superb transport link there is a real opportunity to develop logistics hubs in Meath.

Property and Construction

Traditionally a very important employer in Ireland employment numbers were devastated by the recession. Given the housing shortage, employment in the sector will increase but not to pre-recession levels. It is important that the mistakes of the past are not repeated.

Green and Clean Tech

Ireland has some of the best wind, wave and biomass energy potential in the world, but there is uncertainty regarding the development of renewable energy in Ireland due to planning issues, grid management and the embryonic nature of the sector. There is strong growth potential for the sector but much of this growth is dependent on state support.

Arts Entertainment and Recreation

The sector employs 60,000 people in Ireland but the sector is dominated by small scale operations employing fewer than 10 people. There is scope for modest increase in employment in this sector, reflecting opportunities and growth in tourism.

Education Public and Private

This is a large sector employing 140,000. Ireland has a strong reputation for educational excellence. The sector is dominated by public education and recent issues regarding language schools and visas may affect future growth. There is some opportunity for Meath to develop adult education services but the probably employment growth is likely to be limited.

Domestically/Locally Traded Services

This is a large sector employing over 500,000 people. It is a stable and reliable sector in terms of employment. Employment growth in Meath is liable to be in line with overall growth rather than offering more dynamic opportunities.

EMPLOYMENT TARGETS

Jobs targets and targets for indigenous and foreign direct investment up to 2022.

Employment targets provide tangible measures which can track the achievement of the vision and high level aims of this Strategy and are a means to benchmark progress. They were created using a robust four point approach:

1. Baseline employment informed by a detailed analysis of CSO POWSCAR data 2011.
2. Inputs to the projected level of employment in Meath in 2022, incorporating:
 - a) National economic projections and the employment growth projections for Ireland in the International Monetary Fund's (IMF's) World Economic Outlook, the Irish government's Medium-Term Economic Strategy (MTES), the Department of Finance's Stability Programme Update (SPU) and the Economic and Social Research Institute's (ESRI's) Medium Term Review (MTR).
 - b) Assessment of sectoral and sub-sectoral prospects and opportunities, using data from the Department of Jobs, Enterprise and Innovation and Forfás as well as from the CSO and the consultancy team's own sources.
3. Projected levels of employment in 2022 for each of three economic scenarios (central, optimistic and pessimistic).
4. Further validation of the projected employment levels, making use of available CSO population projections (and estimated housing allocations), to examine employment per capita in 2022 as an additional check on the sustainability of projections.

Employment Projections for Meath 2022 – Total and Sectoral Split

The chart in figure 12 shows the expected outcomes in respect of total employment growth in County Meath between 2011 (the baseline year, in which full information on the local economy of Meath is available

from Census 2011) and 2022 where the extent of growth is formulated in (1) the number of jobs within Meath 2011-2022 (i.e. excluding the outbound commuters) and (2) the number of jobs in the wider Meath labour market which includes the outbound commuters as well.

The overall employment projections are as follows:

- The number of jobs within Meath will rise by over 7,500 – from the 38,822 in the baseline year of 2011 to 46,371 in 2022;
- The wider number of jobs relating to Meath will increase by almost 14,000 – from the 71,764 observed in 2011 to 85,719 in 2022;
- This means that the number of outbound commuter jobs will grow by approximately 6,400 and the rate of outbound commuting will be maintained at the rate observed in 2011, namely 54% (which is reasonable and achievable).

Indigenous Enterprise

Meath has traditionally had a strong indigenous enterprise sector with 12% of employment in Meath in Irish-owned agency-assisted enterprises versus 8% nationally. Employment growth in Irish-owned agency-assisted enterprises pre-crisis was most rapid in Dublin followed by Meath, but since 2010 employment has recovered more strongly in Meath. In particular, between 2010 and 2013 permanent full-time employment in Irish-owned agency-assisted enterprises grew by 17.5% in Meath, compared with 9% in the Mid-East Region, 2% in Dublin and 5% in the country. It is important that these firms are strongly supported in the years ahead if the ambitious targets outlined in this report are to be achieved.

Small businesses in Meath have also traditionally performed better compared with the whole country but since the onset of the crisis after 2007 there has been a downward trend in self-employed income per head in the county.

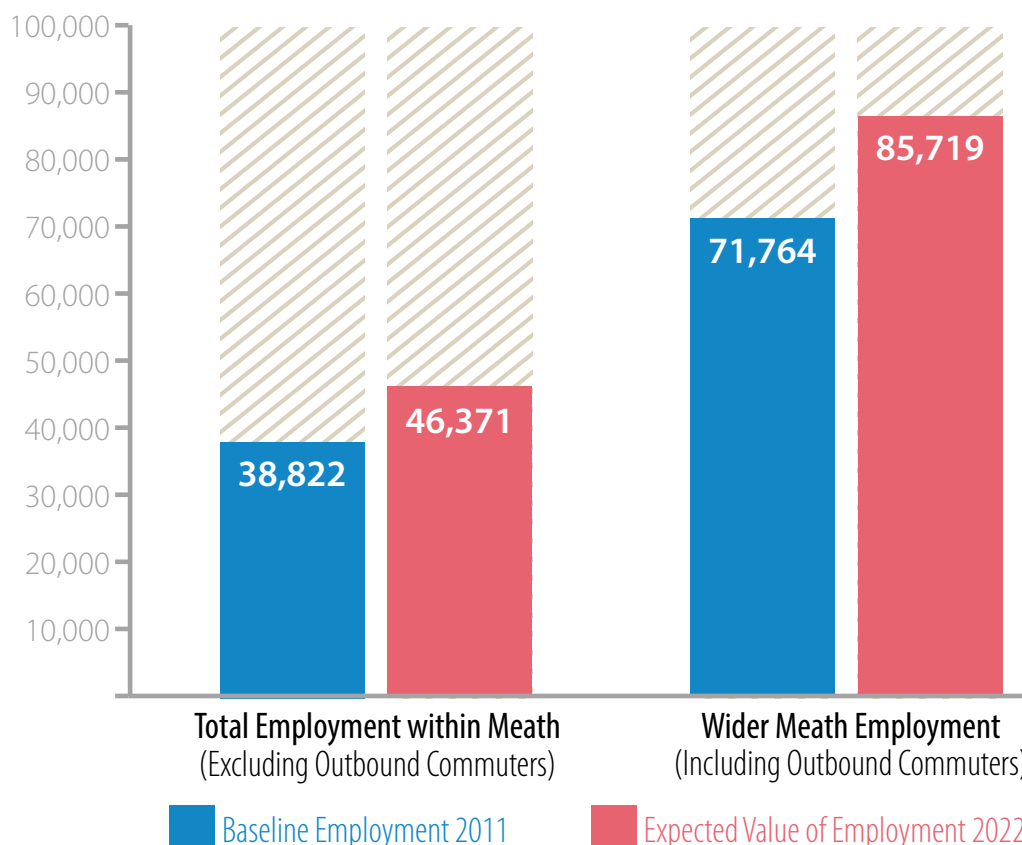


Figure 12: Projections of Persons Employed in County Meath in 2022 – Expected Value of Total Employment (Exclusive and Inclusive of Outbound Commuters) Based on the Central Optimistic and Pessimistic Scenarios

It is important that Meath County Council, Meath Local Enterprise Office (LEO) and Enterprise Ireland work with small businesses to reverse this trend and to ensure that small, ambitious firms, with the potential and ability to grow, are supported in growing new markets and are given access to innovation supports.

Key Targets for Indigenous Employment

- Reverse the downward trend in ratio of self employed income per head in Meath versus the State.
- Maintain or widen the gap in favour of Meath relative to the rest of the country in respect of the proportion of all employment accounted for by agency-assisted Irish-owned enterprises (Meath 12% versus State 8% in 2011).

Foreign Direct Investment (FDI) Landscape

While Meath is host to a number of very successful foreign-owned enterprises that make a significant contribution to the local economy, the county needs more of these firms to achieve its Vision for Meath, particularly in regard to the need to ensure more high-tech and knowledge-based employment within the county and creating new opportunities for skilled workers to work closer to where they live.

Employment in FDI firms in Meath has reduced since 2004 and the county is clearly not fulfilling its FDI potential. The key challenge will be to build on the county's many strengths to market Meath as a cost competitive location for FDI.

The types of FDI targeted for growth in the county include the internationally-traded services and high-tech manufacturing already present in Meath. The existing multinationals in the county provide an important demonstrator of Meath's capacity to accommodate inward investment and there are a number of urban centres, and sites within these, that can be promoted to facilitate more FDI in Meath.

To do so, Meath County Council must make Meath's FDI experience more compelling by emphasising its significant regional dimension and the fact that it is seamlessly connected. It must proactively engage with the IDA through stronger relationship-building between Meath County Council and the State agency; make progress on advancing suitable available sites for FDI and ensure that developments meeting market needs can be realised. Proactive engagement involves developers, FDI firms, IDA Ireland and Meath County Council ensuring sustainable public-private partnerships that result in permanent economic growth and jobs. An inventory or audit of all available workspaces, offices and so on in the county also needs to be carried out to accommodate the possibility that inward investors from time to time prefer to locate to smaller spaces.

Key Targets for FDI Employment

- Narrow the gap against Meath relative to the State in regard to the proportion of all employment accounted for by FDI firms (recalling that the gap against Meath was 2.9% versus 7.9% in 2011)



Aligning the Economic and Spatial Strategies

Integrating investment opportunities with land use planning to give spatial effect to the strategy.

and spatial strategies will enable the Council to develop the economy of the county in a planned structured way which plays to particular strengths of each of the three areas.

INTRODUCTION

County Meath can be divided into three areas each with distinctive characteristics and strengths which are summarised in Figure 13. Aligning Meath's economic

The spatial plan which seeks to provide a framework for economic growth and job creation is the integration of the following three pillars:

Spatial & Economic Structuring

Linking spatial and functional areas by aligning economic growth with the settlement/development hierarchy and continued focus on key employment locations as drivers for growth.

Recognising the important role of smaller settlements/rural economic development in County Meath.

Access To Labour & Markets

Maximising locational advantages of strategic growth centres based on the concept of economic corridors, including proximity to airports, multi modal transport corridors, and location within the metropolitan area/national gateway.

Promoting & Supporting Business

To promote Meath as a location of choice for business and jobs by providing a range of high quality suitable sites and properties, examining initiatives for delivery of strategic employment areas/sites and ensuring the relevant audiences (foreign and domestic) know what we have to offer.

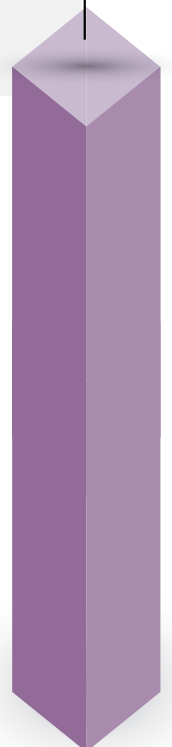




Figure 13: Conceptual Economic Map of County Meath

Navan and Drogheda are the main designated centres of economic activity in Meath. In addition, to these towns, this strategy recognises the vital importance of smaller towns and follows the recommendations of the report 'The Economic Structure of Towns in Ireland 2014' that Councils should focus on a) making small and medium towns more attractive to live in and visit, b) easier to do business c) increase consumer demand and sentiment and d) improve access to finance of SME's.¹⁸

This strategy fully recognises the value of town centres which provide the economic heartbeat for settlements and provide a distinct sense of place and identity. The mixed use nature of town centres remains the focal point for economic activity and this report seeks to look at areas outside of these locations for non-competing economic opportunities and solutions that may not be readily accommodated in the town core.

¹⁸ The Economic Structure of Towns in Ireland 2014, Cathal O'Donoghue, Cathal Geoghegan, Kevin Heanue and David Meredith Teagasc Rural Economy and Development Programme

SPATIAL AND ECONOMIC STRUCTURING

Navan and Drogheda are identified as primary economic growth towns i.e. the main centres of economic activity outside the city region in both the RPGs and the Meath County Development Plan. As such there is a statutory recognition of these areas as drivers of economic growth within the county, as part of the Greater Dublin Region and as part of the national growth strategy for 'Ireland Inc.'

Dunboyne, Ashbourne and Kells are identified as secondary economic growth centres in both the RPGs and Meath County Development Plan, that is they have an important complementary role in developing economic growth and sectoral strengths in tandem with the primary economic growth towns, within their respective core economic areas and large hinterland areas. As a Large Growth Town directly served by new

Settlement	Spatial and Economic Structuring			Access to Labour and Markets	Promoting and Supporting Business
	Economic Character Area	Economic Hierarchy	Settlement Hierarchy	Transport Corridors	Site Scoping
Navan	Central / South Meath	Primary Economic Growth Town	Large Growth Town 1	M3, Bus	IDA Presence
Drogheda	East Meath	Primary Economic Growth Town	Large Growth Town 1	M1 Economic Corridor / EO1, Rail, Bus	IDA Presence
Dunboyne / Ashbourne	Central / South Meath	Secondary Economic Growth Town	Large Growth Town II	M3, M2, Rail, Bus, Port, Airport	Metropolitan Area
Kells	North / West Meath	Secondary Economic Growth Town	Moderate Growth Town	M3, Bus	Assisted Area (regional aid)

Table 4: Aligning Spatial and Economic Development in County Meath
Source: Consultancy team and Meath County Council

public transport infrastructure, Dunboyne is deemed to be the main focus for the Metropolitan Area of the county while Ashbourne is transitioning away from a dormitory hinterland context towards a more urbanised metropolitan character' (RPGs p.74).

The settlements listed above have a pivotal role in serving their urban areas and wider hinterlands in terms of employment and provision of goods and services. These growth towns are located on multi-modal growth corridors which provide access to strategic rail and road networks to the capital gateway, other gateways, ports and airports.

Below this are a series of towns and villages that have a valuable role for employment. It is envisaged these settlements will grow in a self-sustaining manner with levels of growth in population matched by employment opportunities and necessary soft and hard infrastructural supports.¹⁹

The consultancy team (PMCA), in consultation with Meath County Council, has developed a framework (set out at table 4 above) for integrating the three pillars which form the spatial dimension of the economic strategy.

¹⁹ Soft infrastructure refers to elements such as business mentoring and training while hard infrastructure refers to business properties such as offices, utilities and quality of environment.

The important role of smaller settlements/ rural economic development in County Meath

Below the primary and secondary economic growth centres are a series of dynamic settlements and areas that serve a large rural catchment and are strong local drivers of economic activity in their own right.

Examples include the district functions of Trim whose sectoral strengths include manufacturing, tourism and heritage; Oldcastle which has a strong manufacturing base and is an important service centre to a large hinterland area in the northwest of the county and Enfield which has strong access links being served by the M4 Corridor (road and rail service).

In line with the Commission for the Economic Development of Rural Areas (CEDRA)²⁰ there may be opportunities to explore pilot Rural Economic Development Zones (REDZ) or similar concepts to enhance the capacity of local economic development at the sub county and town level.

There are already many examples of rural entrepreneurial spirit in Meath which can be tapped into and which have helped drive employment. One such example includes Dromone Engineering, located in Oldcastle. The company, which has 100 employees, has developed hitches and related technologies for the construction and agricultural sectors. The company now exports its products to 36 countries.

²⁰ Energising Ireland's Rural Economy- List of Recommendations, CEDRA Nov 2013

ACCESS TO LABOUR AND MARKETS

The Spatial Strategy maximises the location advantages of strategic growth centres based on the concept of economic corridors, including proximity to airports, multi modal transport corridors, and location within the metropolitan area/national gateway.

A business survey carried out by Meath County Council in 2013 suggested that:

- Recruiting the right skills is not a major issue or barrier to expansion for enterprises in the county – owing to the strong major roads, which are linked to the M50 (this enables firms to recruit from a larger labour pool).
- Career focused workers are prepared to travel, but it highlights that skilled and well-trained professionals are interested in taking up employment closer to their homes rather than commuting.

It is therefore important that Meath responds to the challenge of maximising location advantage and provides local employment opportunities for commuters. The spatial element of this strategy seeks to achieve this.



PROMOTING AND SUPPORTING BUSINESS IN MEATH

Meath County Council intends to promote Meath as a location of choice for business and jobs by providing a range of high quality suitable sites and properties, and fiscal measures for delivery of strategic employment areas/sites while ensuring the relevant audiences (foreign and domestic) know what we have to offer.

Significant work has been undertaken by Meath County Council in recent years to support businesses. One such example is the 'Make it Meath' initiative which provides a range of information and marketing brochures highlighting the attributes of several settlement areas in Meath including Navan, Dunboyne, Ashbourne and Kells. This offers a useful platform to integrate the idea of site selection within these already identified settlements.

An additional toolkit of potential options is set out below.

Fiscal

- Examine the application of financial incentives to support sustainable economic development. This could include looking at opportunities to utilise the development contributions scheme, rate base and grants such as heritage grants, tourism grants and/or business start-up grants.

Infrastructure

- Create an assessment matrix of service and infrastructure for strategic sites/areas and address barriers to ensure they are ready to go for investment. Stakeholders consulted during the study have highlighted the lack of broadband service in their parts of the county and this important requirement needs to be addressed as a matter of priority.
- Advance property solutions to ensure Meath can meet market needs. Such interventions can be capital intensive and require substantial funding which may be difficult in current circumstances. The onus is therefore on the Meath County Council to create the conditions and reassurances to investors to deliver advance properties. Some options to

consider include Public Private Partnerships (PPPs), advance/seed funding by a separate Meath County Council 'Development Agency', providing Meath Local Authority lands to the project, structural funding mechanisms etc.

delivery of key town centre sites and it is considered that a similar approach should be adopted to facilitate the delivery of strategic employment generating sites. Meath County Council should actively engage with landowners to facilitate the delivery of key sites.

Land Ownership

- In many instances, multiple land ownerships can delay the delivery of strategic sites for economic and employment development. The Retail Planning Guidelines recommend that planning authorities actively engage with landowners to facilitate the

Regulation

- Ensure necessary agreements and regulatory paper work are in place in advance of physical infrastructure developments such as planning permissions, licensing and relevant agency consents where appropriate.



Internal Structuring

- Sole point of contact within Meath County Council, with sufficient capacity and authority, to work with IDA and Enterprise Ireland on ongoing basis.
- More structured relationship between Meath County Council and businesses (e.g. advice on services, compliance and best practices in other locations) with the Local Enterprise Office as lead responsibility for co-ordinating this process.
- The provision of a well-resourced research and economic office for Meath County Council (similar to the other economic business units) to develop in-house expertise to support the MEF and wider Council corporate goals.
- Work with national agencies and departments to ensure effective and optimal alignment of capital spending to support strategic employment areas within County Meath.
- Develop relationships with Chambers of Commerce to advance economic development in the county e.g. Purple flag projects, training and promotion of SMEs and supporting local and national enterprise events.
- Working with education providers to provide a wide range of skills and training to respond to the needs of SMEs and support entrepreneurship.

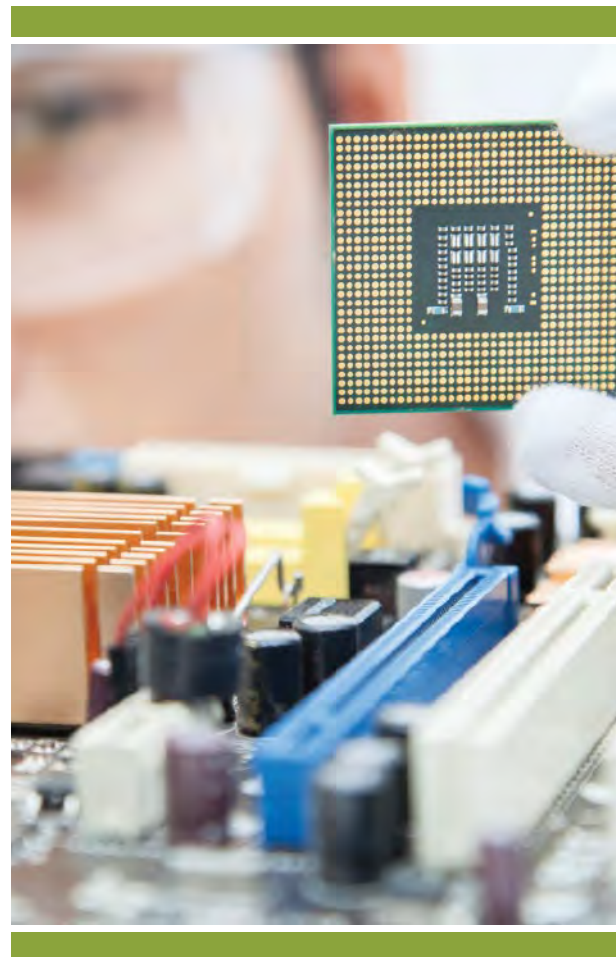
APPROPRIATE ASSESSMENT (AA)

An AA Screening in compliance with Article 6 of the Habitats Directive has been undertaken on the Economic Development Strategy 2014-2022. Following an analysis of the Strategy and potential relationships with European sites, the screening concluded that there would be no likelihood of significant effects on any European sites, either alone or in combination with other plans or projects (with no requirement to carry out further stages of Appropriate Assessment on the Strategy). This was informed by the collection of data on the European sites and identification of the condition, sensitivities and threats to the integrity of the sites. This decision has been informed by an Appropriate Assessment Screening Report prepared by Scott Cawley Limited on behalf of Meath County Council. The full report is available at: <http://www.meath.ie/Business/MeathEconomicDevelopmentStrategy/>

STRATEGIC ENVIRONMENTAL ASSESSMENT (SEA)

A Strategic Environmental Assessment (SEA) Screening Report has been carried out on the Economic Development Strategy for County Meath 2014- 2022 by Brady Shipman Martin on behalf of Meath County Council.

Following review and consideration of the issues pertaining to the Economic Development Strategy 2014-2022, the screening report concluded that the strategy in itself will not result in a significant adverse environmental effect and will therefore not require a detailed assessment of effects through the SEA process. The full report is available at: <http://www.meath.ie/Business/MeathEconomicDevelopmentStrategy/>



Marketing

The marketing and branding component of the Economic Development Strategy for Meath is critical because it will pull together the Economic and Spatial Actions for communication to key target audiences, nationally and internationally, including FDI firms, IDA Ireland and visitors.

The Marketing Plan accompanying the Economic Development Strategy is illustrated in Figure 14. This shows how the Marketing measures proposed here are evidence-based and designed to facilitate the realisation of the Economic Vision for County Meath.

The marketing activity will be based around key messages and communicating the messages to target audiences. Key objectives of the marketing process include portraying Meath as a unique high quality and cost-competitive environment for inward investment and enterprise development and that Meath County Council and other organisations in the enterprise support environment in the county are available to proactively facilitate investment and economic diversity in the county. Key target audiences include the IDA, prospective FDI companies, and local entrepreneurs.

Consistent and continuous messaging is critical to effective communication of the key messages.

Whatever your Business.....Make It Meath

Oifig Fiontair Áitiúil
Local Enterprise Office

Visit www.meath.ie/business or www.localenterprise.ie/meath

 **comhairle chontae na mí**
meath county council

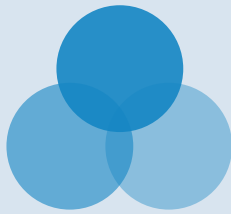


Figure 14: Schematic Illustration of a Marketing Plan for Meath

Source: Consultancy Team and Review Analysis



Connecting



Communications

Engagement

Key Elements of Marketing Strategy

- 1 A strategic location
- 2 A productive location
- 3 Location of choice for business
- 4 Business infrastructure
- 5 A location for new business opportunities

Unique Selling Points



Face-to-face



Workshops



TV / Radio



Print Media



Trade Events and Expos



Social/Digital Media

Marketing Channels



SMEs



Indigenous Industry



Media



Tourism and Hospitality

Target Audiences



Students, Skills and Learning



National Government and Departments



Elected Representatives (local, national and EU)



Development Agencies (IDA, EI and FI)



Commuters



Indigenous Population



Meath Diaspora and Meath "Twins" abroad



International Brands - FDI (Prospective and Existing)

BRANDING

'Whatever Your Business... Make it Meath' is the umbrella brand that will feed into the marketing plan. There are a number of taglines that have and will continue to be used in association with this brand including '5,000 years of innovation... are you part of it yet?' The image below provides an illustration of our current brand and associated taglines. This image will be used to communicate the message that Meath has developed over the years to become a progressive, innovative and cost competitive location for enterprise and various industry sectors.

Five thousand years ago Meath was at the cutting edge of innovation in Europe. As Science Foundation Ireland recently pointed out, the megalithic tomb at Newgrange which is precisely aligned to flood the inner burial chamber with light on the shortest day of the year demonstrates the high level of engineering skills of our remote ancestors. The factors which led to the creation of Western Europe's first innovation hub in Meath, location and connectivity, a highly skilled workforce and a great quality of life, are still present.



Economic Objectives and Action Plan to Deliver the Strategy

Economic Strategy: 8 Point Plan

INTERNAL ENGAGEMENT

- 1 Create and promote a culture that supports sustainable economic development practices within Meath County Council.

EXTERNAL ENGAGEMENT

- 2 Engage and work with State Agencies, Regional Agencies, Higher Education Institutions and Local Enterprise Agencies to stimulate and grow economic development in Meath.
- 3 Collaborate with wealth creators and business innovators who have the capacity to assist in job creation and entrepreneurship.

SPATIAL IMPLEMENTATION

- 4 Promote our towns and strategic employment sites as the economic drivers for employment in Meath while acknowledging the role of the rural economy.
- 5 Identify and support investment in infrastructure and services that enable and deliver economic development.

FISCAL INCENTIVES

- 6 Examine financial incentives designed to aid the delivery of the employment generation.

MARKETING

- 7 Develop a marketing plan and initiatives aimed at promoting the economic strategy.

REVIEW AND MONITORING

- 8 Review and monitor progress and trends in implementing the economic strategy and action plan.

OBJECTIVE 1: INTERNAL ENGAGEMENT

Create and promote a culture that supports sustainable economic development practices within Meath County Council.

	Priority Action	Timeframe	Stakeholders
1	Provision of a well-resourced research economic and enterprise office for Meath County Council to develop in house expertise to support the Council (corporate goals), the Planning and Enterprise SPC and to promote best practices for job creation initiatives.	2015-2022	All MCC Depts., Elected Members, Planning & Enterprise SPC, State & Regional Bodies, External Professional Expertise, Community and Voluntary Groups
2	Embed an Economic Development ethos and culture into all Departments of Meath County Council and ensure all staff and elected members are aware of the role of Local Authorities as a lead agent at local level to create jobs.	2015-2022	All MCC Depts., Elected Members, Planning & Enterprise SPC, State & Regional Bodies, External Professional Expertise, Community and Voluntary Groups

OBJECTIVE 2: EXTERNAL ENGAGEMENT

Engage and work with State Agencies, Regional Agencies, Higher Education Institutions and Local Enterprise Agencies to stimulate and grow economic development in Meath.

	Priority Action	Timeframe	Stakeholders
3	Promote and market Meath as a location of choice for economic development and increase proactive engagement between Meath County Council and key players.	2015-2022	State & regional agencies , Local business supports, landowners and developers. Education and Training Providers, Meath Economic Forum (MEF), Planning & Enterprise SPC, Elected Members, SMEs/ FDI businesses
4	Aid and support the collaborative working of all education and training providers with relevant stakeholders and local employers to develop and deliver targeted responses to skills and employment needs and to determine the feasibility of establishing Third Level outreach facilities.	2015-2022	Education providers, SMEs, EI, IDA, MEF, Meath Partnership, Regional Bodies, State Bodies, FDI & indigenous businesses. Meath LCDC
5	Build upon the status of Kells as part of EU designated regional aid area and explore available funding streams to support enterprise within Meath.	2015-2022	SMEs, Chambers of Commerce, EI, IDA, MCC, Planning & Enterprise SPC, Meath LCDC, State & Regional Bodies, International & EU Offices
6	Identify and provide appropriate training and business supports to local people and businesses.	2015-2022	Education Providers, FDI & Indigenous Businesses, MEF, Local Business Support Agencies, Meath LCDC
7	Sister City Projects – work in partnership focusing on sharing and learning best practices to boost economic development.	2015-2022	Sister Cities, Chambers of Commerce, MEF, Planning & Enterprise SPC, Elected Members, EI/IDA
8	Meath County Council to participate in, and where appropriate, work in partnership to host relevant national/ international investment promotion events, seminars, conferences, etc.	2015-2022	MCC, MEF, Relevant business sectors, External Professional Expertise, Planning & Enterprise SPC, Elected Members, Media
9	Meath County Council to make the necessary resources available to assist any party (public and private) bringing forward a development proposal for the proposed Regional Hospital for the North East in Navan.	2015-2022	MCC, State and Regional bodies, Private Sector, External Professional Expertise
10	Develop the Boyne Valley as a recognised 'must go to' destination in national and international tourism.	2015-2022	MCC, Tourism Providers, Tourism Ireland, Fáilte Ireland, State and Regional Bodies, MEF

OBJECTIVE 3: EXTERNAL ENGAGEMENT

Collaborate with wealth creators and business innovators who have the capacity to assist in job creation and entrepreneurship.

	Priority Action	Timeframe	Stakeholders
11	Develop and implement best practise to serve wealth creators/ businesses and enterprises (all sizes & sectors, indigenous and foreign owned).	2016-2022	All MCC Depts., Meath LCDC, Elected Members, Planning & Enterprise SPC, IDA/EI, SMEs, FDI/Indigenous companies, State & Regional Bodies
12	Promote the use of energy hubs/energy efficient business processes, practices and buildings.	2016-2022	All MCC Depts., Elected Members, Planning & Enterprise SPC, IDA/EI, SMEs, FDA/Indigenous companies, State & Regional Bodies, External Professional Expertise
13	Facilitate the coordination of all Chambers of Commerce in Meath to create one overall representative body.	2016-2018	Chambers of Commerce, Chambers Ireland, Elected Members, Planning & Enterprise SPC, FDI & Indigenous businesses
14	Review the provisions of the CERDA reports and examine the potential for a pilot CEDRA REDZ in Meath (rural economic development zones) or similar concepts to enhance the capacity of local economic development at sub county and town level.	2015-2022	MCC, Elected Members, Planning & Enterprise SPC, State & Regional Bodies, External Professional Expertise, Meath LCDC
15	Consider the establishment of a BIDS (business improvement district scheme) in Navan.	2016-2020	State & Regional Bodies, External Professional Expertise, Existing BIDS, Chambers of Commerce
16	Ensure Meath remains a cost competitive location to do business, work, live and visit.	2015-2022	MCC, Chambers of Commerce, Elected Members, Meath LCDC, Planning & Enterprise SPC, FDI & Indigenous businesses, State & Regional Bodies, Adjoining Local Authorities, External Expertise
17	Support the Tourism Trade to attract increased business and generate additional bed-nights.	2015-2022	MCC, Tourism Providers, Tourism Ireland, Fáilte Ireland, State and Regional Bodies, MEF
18	Support initiatives which enhance the quality of life through support for the arts, sport and recreation and heritage potential of the county.	2015-2022	Relevant MCC Depts., Meath LCDC, PPNS, Chambers of Commerce, Elected Members, Planning & Enterprise SPC, State & Regional Bodies, Adjoining Local Authorities, External Expertise

OBJECTIVE 4: SPATIAL IMPLEMENTATION

Promote our towns and strategic employment sites as the economic drivers for employment in Meath while acknowledging the role of the rural economy.

	Priority Action	Timeframe	Stakeholders
19	Promote the hierarchy of economic centres and targeted sectors in Meath with the objective of facilitating significant new enterprise development in Meath.	2015-2022	MCC, Elected Members, Planning & Enterprise SPC, State & Regional Bodies, External Expertise
20	Examine pilot strategic sites to advance in Navan, Ashbourne, Drogheda, Kells and Dunboyne including targeted sectors and cluster opportunities. Develop and implement best practise to advance same.	2015-2022	MCC, IDA, EI, FDI/Indigenous companies, External Expertise, Private investors/land owners/developers/wealth creators
21	Promote other workspaces for indigenous and/or rural enterprise development.	2015-2022	Relevant MCC Depts., State & Regional Bodies, Private Service Providers, External Expertise, Landowners/developers/wealth creators, FDI & indigenous businesses

OBJECTIVE 5: SPATIAL IMPLEMENTATION

Identify and support investment in infrastructure and services that enable and deliver economic development.

	Priority Action	Timeframe	Stakeholders
22	Conduct an assessment of all available infrastructure and services (matrix) on all identified sites with employment potential, with investment priority to strategic employment zones.	2015-2022	Relevant MCC Depts., State & Regional Bodies, Private Service Providers, Adjoining Local Authorities, External Expertise, Landowners/developers/ wealth creators
23	Develop and operate best practise procedures to enter into public private partnerships.	2015-2022	Relevant MCC Depts., Government Departments, State & Regional Bodies, Private Service Providers, Adjoining Local Authorities, External Expertise, landowners/developers/ wealth creators
24	To encourage the further co-ordinated and focused development and extension of telecommunications infrastructure including broadband connectivity in the county as a means of improving economic competitiveness and quality of life.	2015-2022	Relevant MCC Depts., State & Regional Bodies, Private Service Providers, Adjoining Local Authorities, External Expertise, landowners/developers/ wealth creators
25	Enhance and promote the role of Town Centres to better facilitate economic development.	2015-2022	Relevant MCC Depts., State & Regional Bodies, External Expertise, Land owners/ developers/wealth creators, Chambers of Commerce, Elected Members, Planning & Enterprise SPC

	Priority Action	Timeframe	Stakeholders
26	Advance property solutions – Advance suitable sites and purpose built buildings for FDI & indigenous businesses and ensure that developments meet market needs with high quality infrastructure and utility provision.	2015-2022	Relevant MCC Depts., Landowners/ Wealth creators/developers, Public Private Partnerships, Adjoining Local Authorities, IDA, EI, FDI & Indigenous businesses, State & Regional Bodies.

OBJECTIVE 6: FISCAL INCENTIVES

Examine financial incentives designed to aid the delivery of the employment generation.

	Priority Action	Timeframe	Stakeholders
27	Meath County Council to consider the possibility and where appropriate introduce financial incentives designed to aid the delivery of the employment generation in specific locations/sites.	2014-2022	MCC, Elected Members, Planning & Enterprise SPC, Landowners/ Wealth creators/developers, Public Private Partnerships, FDI & Indigenous businesses, EU, State & Regional Bodies

OBJECTIVE 7: MARKETING

Develop a marketing plan and initiatives aimed at promoting the economic strategy.

	Priority Action	Timeframe	Stakeholders
28	Develop and implement an integrated marketing strategy for the County (Publish promotional material for key strategic sites beginning with the IDA in Navan and Drogheda).	2016-2022	Relevant MCC Depts., Elected Members, Planning & Enterprise SPC, SMEs/FDI/ Indigenous businesses, MEF, Chambers of Commerce, BIDS, Embassies, Meath Diaspora, Media, External Expertise
29	Publish the Economic Strategy in a user friendly format incorporating the key components of background documents.	2015-2016	Relevant MCC Depts., Elected Members, Planning & Enterprise SPC, MEF, External Expertise
30	To raise the profile of the Boyne Valley destination amongst tour operators, tour guides, tourism agencies and the travel trade.	2015-2022	MCC, Tourism Providers, Tourism Ireland, Fáilte Ireland, State and Regional Bodies, MEF, Meath LCDC
31	To raise awareness of Meath and the Boyne Valley as 'a must see' destination amongst holidaymakers.	2015-2022	MCC, Tourism Providers, Tourism Ireland, Fáilte Ireland, State and Regional Bodies, MEF, Meath LCDC

OBJECTIVE 8: REVIEW AND MONITORING

Review and monitor progress and trends in jobs.

	Priority Action 7,500 jobs increase 2022	Timeframe	Stakeholders
32	FDI -Narrow the gap against Meath relative to the State in regard to the proportion of all employment accounted for by FDI firms (recalling that the gap against Meath was 2.9% versus 7.9% in 2011).	2015-2022	MCC, Elected Members, Planning & Enterprise SPC, IDA, Existing & potential FDI businesses, Meath Diaspora, State & regional bodies, International & EU offices, Education providers, MEF, Chambers of Commerce, Relevant business sectors, Landowners/developers/ wealth creators, Media & External expertise.
33	Indigenous Enterprise Development (Reverse the downward trend in ratio of self-employed income per head in Meath versus the State) Maintain or widen the gap in favour of Meath relative to the country as a whole in respect of the proportion of all employment accounted for by agency-assisted Irish-owned enterprises (Meath 12% versus State 8% in 2011)	2015-2022	EI, Existing & potential indigenous businesses, SMEs, Local business supports, MCC, Elected Members, Planning & Enterprise SPC, Meath Diaspora, State & regional bodies, International & EU offices, Education providers, MEF, Chambers of Commerce, Relevant business sectors, Landowners/developers/ wealth creators, Media & External expertise.
34	Entrepreneurship - To drive and foster entrepreneurship, increasing the number of start-ups, enterprise and incubation spaces and to encourage entrepreneurship through targeted programmes and initiatives. Meath County Council recognises that nurturing innovation is critical to attracting and developing enterprise in the County as well as encouraging sustainable job creation and growth.	2014-2022	EI, Existing & potential entrepreneurs, SMEs, Local business supports, MCC, Elected Members, Planning & Enterprise SPC, Meath Diaspora, State & regional bodies, International & EU offices, Education providers, MEF, Chambers of Commerce, Relevant business sectors, Landowners/developers/wealth creators, Media & External expertise.
35	Tourism - The Boyne Valley is recognised as the birthplace of Ireland’s Ancient East. Increase offering of high level tourism provision for visitors to increase business and generate additional bed-nights.	2014-2022	MCC, Tourism Providers, Tourism Ireland, Fáilte Ireland, State and Regional Bodies, MEF, Meath LCDC
36	Meath Labour Market – Meath has a growing young population with the second highest labour force participation rate in the country at 65.8%. The majority of people residing in County Meath are employed outside the county. The level of education attainment of outbound commuters is (41.3%) for third-level or higher educational qualifications. To ensure a greater retention of economic impact by tapping into this critical mass of talent and contribute to people’s quality of life.	2014-2022	MCC, State & regional bodies, Meath residents, existing businesses

Implementation, Monitoring and Delivery

Organisational Measures to Support Economic Development

Meath County Council has put in place organisational measures to ensure effective implementation and delivery of this strategy. These include: a) Strategic Policy Committee, b) Meath Economic Forum and c) Technical Working Group. This structure will ensure that implementation of the strategy is guided by good corporate governance, business acumen and technical proficiency.



Mr. John Bruton, Chairperson of Meath Economic Forum; Councillor Jim Holloway, Cathaoirleach to Meath County Council in June 2015; Ms. Jackie Maguire, Chief Executive, Meath County Council at the launch of Meath Economic Development Strategy 2014-2022

CORPORATE PLAN AND SERVICE DELIVERY PLANS

The Corporate Plan and Service Delivery Plans are viewed as being essential delivery agents for the economic strategy.

The Corporate Plan²¹ is a 5 year plan and serves as the strategic framework for action across Council Departments.

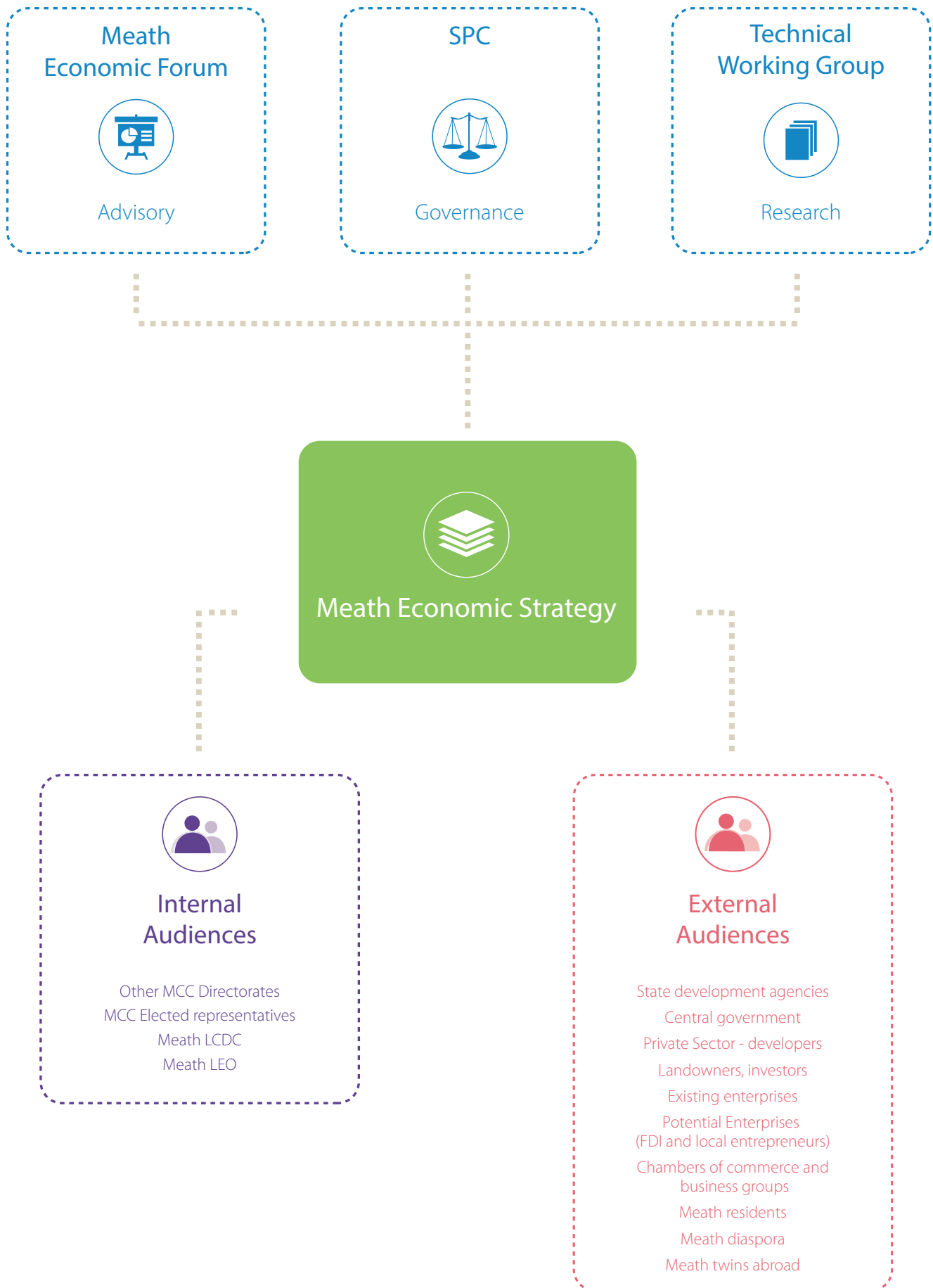
It plays a key role towards realisation of the vision set out in the "Action Programme for Local Government – Putting People First" for Meath County Council to be "the main vehicle of governance and public service at local level – leading economic, social and community development, delivering efficient and good value services, and representing citizens and communities, as effectively and accountably as possible."

Strategic Objective 2 of the Corporate Plan seeks to 'Lead Economic Development'. A series of strategic actions to support this includes:

- Operate as the lead agency for economic development and be recognised as the first point of contact for economic development in Meath.
- Be seen as positive, professional and helpful by the business community, using resources to attract, retain and support business.
- Build strong influential partnerships with other agencies nationally and locally in order to promote Meath as the investment location of choice.
- Develop Meath and the Boyne Valley as 'must go to' destination in national and international tourism.
- Support the retail sector in key locations so it may be in a position to fulfil its true potential and reduce retail leakage from the county.
- Work towards a thriving and sustainable rural economy.

The Corporate Plan is supported by a series of Annual Service Delivery Plans which will develop the implementation process by outlining in detail how the objectives will be achieved. Performance measurement will form a key part of the implementation process.

²¹ <http://www.meath.ie/CountyCouncil/Publications/CorporatePublications/CorporatePlan/File,61387,en.pdf>



LOCAL ECONOMIC AND COMMUNITY PLAN (LECP)

The LECPs contain economic and community elements. Section 36 of the Local Government Reform Act 2014 provides that: “economic elements of the Plan means those parts of a local economic and community plan relating to the promotion of economic development of the administrative area of the local authority”.

This strategy forms part of the policy framework to inform the economic element of the LECP and the metrics used therein.

Economic Elements

- The medium-term Economic Strategy 2014-2020.
- The Action Plan for Jobs.
- Regional spatial and economic strategies.
- The Economic Strategy for County Meath 2014-2022

Community Elements

- National Action Plan for Social Inclusion 2007-2016.
- Better Outcomes, Brighter Futures: The National Policy Framework for Children and Young People 2014-2020.
- Further Education and Training Strategy 2014-2019.
- Social Housing Strategy 2020.
- 20 Year Strategy for the Irish Language 2010- 2030.
- Our Communities: A Framework Policy for Local and Community Development in Ireland (DRAFT).
- Meath County Development Plan.
- SICAP tender for County Meath.

Both Elements

- The National Reform Programme under the Europe 2020 strategy.
- Our Sustainable Future: A Framework for Sustainable Development for Ireland (2012).
- The OECD report, Tackling Disadvantage in a Time of Limited Resources, the rural case study in which was based on North Meath.
- LEADER Local Development Strategy

The list of indicators for the strategy was chosen to be relevant, measurable and manageable to provide the Executive Team with an effective scorecard to measure progress and ensure accountability.

It is recommended that each meeting of the MEF focuses on outputs and tracking progress, and seeks to understand any impediments or bottlenecks arising and how they can be alleviated.

Following the next censuses in 2016 and 2021, this strategy recommends that Meath County Council should then (in 2017 and 2022) engage in a mid-term review and final review of the Strategy respectively.

This would be based around the POWSCAR data available following those censuses and would provide the opportunity to undertake an external and independent review of progress on the Strategy at the times indicated.

Use of the POWSCAR data (2016 and 2022) would permit all of the projections relating to the Economic Vision for Meath to be appraised.

RISKS

The main risks associated with the Strategy are four-fold as follows:

- *Macroeconomic* – the national economy performs less strongly than projected, which could arise from any or all of the following possibilities; (a) the wider political landscape; (b) lagging European economic performance; (c) escalation of the geo-political tensions internationally, leading to higher inputs prices and economic/investment uncertainty; (d) uncertainty in the UK over its place in the EU; and (e) reversal of the historically low interest rate cycle – once an increase in the euro rate occurs, which almost definitely will occur at some stage, the upward cycle will likely commence and this could have adverse ramifications for spending and investment;
- *FDI* – (a) Ireland’s position as one of the leading host countries for inward investment deteriorates because of more intense competition from lower cost locations; and (b) threats to Ireland’s low corporation

tax in the US ('tax inversions' has become a major issue in that country), the EU (from the Common Consolidated Tax Base) and the OECD BEPS process (concluding in 2015);

- *Competitive* – that other locations within Ireland will compete more vigorously for FDI (e.g. we expect Kerry to be in this category as well as Galway, Limerick and Louth etc., as well as Dublin);

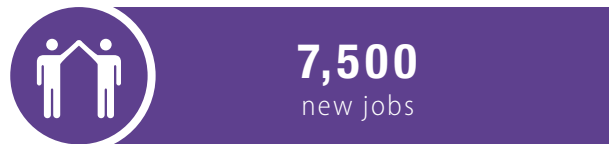
Bureaucracy – the actions proposed get caught up in red tape through the planning process and/or personnel resisting change.

- The active support of the key enterprise development agencies IDA, EI and Fáilte Ireland for the Strategy;
- Positive engagement with and the support of the private sector, including landowners, property developers and investors, for the strategy;
- The continued effective functioning of the MEF in supporting enhancement of the economic performance of Meath; and
- The adoption and practice of the Strategy within and across all directorates of Meath County Council (the key issue of internal audiences within the Council).

SUCCESS FACTORS

The success factors for the Economic Development Strategy for Meath include the following:

- The projections for economic and employment growth during 2014-2022 prove to be accurate;
- Sectoral shifts and opportunities in knowledge-intensive activities are leveraged;
- The delivery of the identified sites and their promotion – including the IDA Business and Technology Parks in Navan and Drogheda, sites in Dunboyne, Ashbourne and Kells etc.;



Glossary of Terms

AIRO

All-Island Research Observatory

BEPS

Base Erosion and Profit Shifting

BIDS

Business Improvement District Scheme

Brexit

British Exit from EU

BRIC

Brazil, Russia, India and China

BTEI

Back to Education Initiative

CDP

County Development Plan (Meath – 2013-2019)

CEB

County/City Enterprise Board (former – now subsumed as part of the LEOs or Local Enterprise Offices)

CEDRA

Commission for the Economic Development of Rural Areas

CEO

Chief Executive Officer

CSO

Central Statistics Office

ECDL

European Computer Driving License

Economic Development Strategy

Economic Development Strategy for County Meath during the period 2014-2022

ED

Electoral Division.

EI

Enterprise Ireland

ESRI

Economic and Social Research Institute

ETB

Education and Training Board

EU

European Union

EWIC

East West Interconnector

FDI

Foreign direct investment

FTE

Full Time Equivalent

FTI

FTI Consulting

GDA

Greater Dublin Area

GVA

Gross value added.

HEI

Higher education institution

ICT

Information and communications technology

IDA Ireland

Industrial Development Authority Ireland – responsible for foreign direct investment (FDI) into Ireland by foreign-owned firms

IMF

International Monetary Fund

IoT

Institute of Technology

LAU

Local Administrative Unit

LCDC

Local Community Development Committee.

LEA

Local Electoral Area

LECP

Local Economic and Community Plan

LEO

Local Enterprise Office

LFP rate

Labour force participation rate – the ratio of the labour force (given as the sum of those at work and those unemployed) to the number of persons aged 15 years and over)

LMETB

Louth Meath Education and Training Board

MANs

Metropolitan Area Networks

Meath LEO

Meath Local Enterprise Office

MEF

Meath Economic Forum

Mid-East Region

Comprising Counties Meath, Kildare and Wicklow

MTEs

Mid-Term Economic Strategy

NI

Northern Ireland

NLN

National Learning Network

NUI

National University of Ireland

NUTS

Nomenclature of Territorial Units for Statistics

OECD

Organisation for Economic Co-operation and Development

PLC

Post Leaving Certificate

PMCA

PMCA Economic Consulting

POWSCAR

Place of Work, School or College – Census of Anonymised Records (CSO)

PPN

Public Participation Network

PPP

Public Private Partnership

Putting People First

Putting People First – Action Plan for Effective Local Government (October 2012)

QQI

Quality and Qualifications Ireland

REDZ

Rural economic development zone

RPG's

Regional Planning Guidelines

SME

Small and medium enterprise

SPC

Strategic Policy Committee

SPU

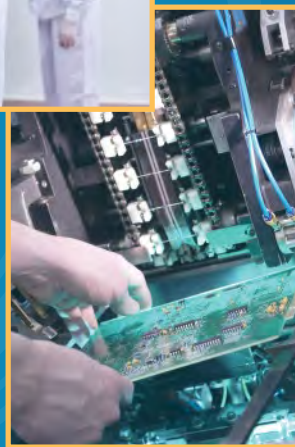
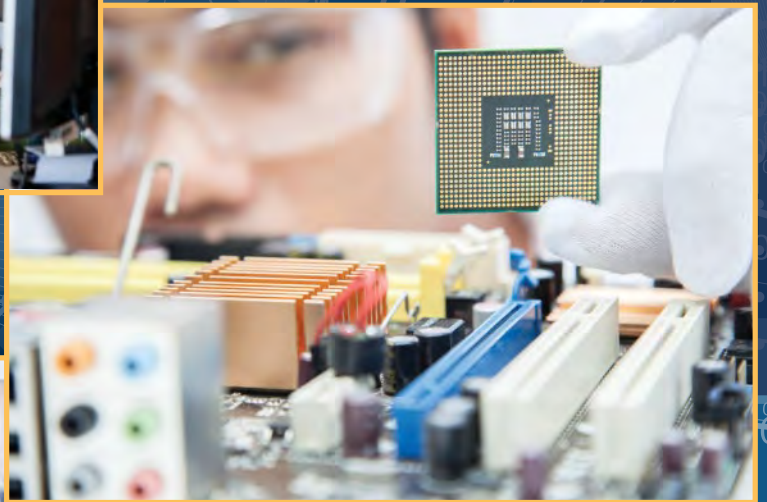
Stability Programme Update

UNESCO

United Nations Educational, Scientific and Cultural Organization

VTOS

Vocational Training Opportunities Scheme




 Oifig
 Fiontair
 Áitiúil

 Local
 Enterprise
 Office



comhairle chontae na mí
 meath county council

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