

REPORT OF THE ECONOMIC DEVELOPMENT STRATEGY FOR COUNTY MEATH 2014-2022

Prepared for:

Meath County Council



By:

***FTI Consulting
PMCA Economic Consulting
John Spain and Associates***

09 December 2014

Table of Contents

List of Exhibits	i
Preface	i
Key Messages	ii
Executive Summary.....	iii
Glossary of Terms.....	xxiii
Acknowledgements and Disclaimer	xxx
1 Introduction	1
1.1 Purpose of the Report.....	1
1.2 Strategic Context of the Economic Development Strategy	1
1.3 Terms of Reference for the Study.....	1
1.4 Methodology.....	4
1.5 Structure of the Report.....	9
2 National Policy Context.....	10
2.1 Introduction	10
2.2 Local Authority Reform	10
2.3 Putting People First.....	10
2.4 Local Government Reform Act 2014.....	17
2.5 New Regional Assemblies	18
2.6 National Spatial Strategy (NSS) 2002-2020.....	20
2.7 Spatial Planning and National Roads: Guidelines for Planning Authorities 2012	25
2.8 Retail Planning Guidelines for Planning Authorities 2012	27
2.9 Food Harvest 2020	29
2.10 Foreign Direct Investment (FDI) and IDA Ireland's FDI Strategy.....	32
2.11 FDI Performance in Meath.....	34
3 Regional Policy Context	47
3.1 Introduction	47
3.2 Mid-East Regional Authority (MERA) Economic Development Action Plan	47
3.3 Regional Planning Guidelines (RPGs) for the Greater Dublin Area (GDA)	48
3.4 Retail Planning Guidelines for the Greater Dublin Area (GDA).....	55
3.5 Gateways and Hubs Development Index 2012: A Review of Socio-Economic Performance	56
3.6 Regional Indicators Report 2014.....	56
4 Local Policy Context.....	59
4.1 Meath County Development Plan (CDP) 2013-2019 (As Varied).....	59
4.2 Meath County Retail Strategy 2013-2019.....	64
4.3 Meath Tourism.....	65
4.4 Local Planning Policies	67

5	Relevant European Policy Context and Economic Developments	68
5.1	Building a More Competitive EU	68
5.2	European Funding Opportunities.....	68
5.3	Economic Developments	72
6	Summary Assessment of the Policy and Economic Developments.....	84
7	Focused Economic Profile of County Meath.....	85
7.1	Introduction	85
7.2	Relative Income Performance of Meath.....	85
7.3	People Resources – People Residing in Meath	90
7.4	Structure of Employment <i>within</i> Meath.....	132
7.5	Composition of Meath’s (Outbound) Commuter Population	140
7.6	Enterprise Performance.....	150
7.7	Tourism	158
7.8	Economic Infrastructure	163
7.9	Summary – SWOT Analysis of the Local Meath Economy	165
8	The Economic Vision and its Spatial Expression for Meath.....	167
8.1	Introduction	167
8.2	Statement of the High-Level Characteristics of the Economic Vision.....	168
8.3	Methodology for Formulating the Economic Vision.....	169
8.4	Analysis of the Economic Vision and its Spatial Expression.....	171
8.5	Summary and Indicative Key Targets by 2022	238
9	Actions for the Economic Development Strategy for County Meath 2014-2022.....	239
9.1	Introduction	239
9.2	Synopsis of Past and Current Economic Performance of Meath.....	240
9.3	Economic/Strategic Actions	246
9.4	Spatial Actions.....	250
9.5	Marketing Actions.....	253
9.6	Implementation and Monitoring of the Economic Development Strategy.....	258
9.7	Tabular Summary of the Proposed Actions	262
10	Concluding Remarks	264
	Annex: Supplementary Information	265

List of Exhibits

Table 2.1: Hierarchy of County Meath Settlements in the National Spatial Strategy (NSS) 2002-2020	24
Table 3.1: Hierarchy of County Meath Settlements in the RPGs for the GDA 2010-2022	49
Table 4.1: Hierarchy of County Meath Settlements in the Meath CDP 2013-2019	60
Table 4.2: Hierarchy of County Meath Settlements in the Meath CDP 2013-2019, RPGs for the GDA 2010-2022 and the NSS 2002-2020	61
Table 5.1: Summary of Economic Projections for the Irish Economy and Employment Growth Rates to be Used to Inform the Economic Vision for Meath 2022	83
Table 7.1: Economically Active Persons in Meath and Selected Other Parts of Ireland (2011)	92
Table 7.2: Persons Aged 20-44 Years in Meath and Selected Other Parts of Ireland (2011)	92
Table 7.3: Dependency Rates in Meath and Selected Other Parts of Ireland (2011)	93
Table 7.4: Number and Proportion of Non-Irish Residents in Meath and Selected Other Parts of Ireland (2011)	94
Table 7.5: Labour Force Participation in Meath and Selected Other Parts of Ireland (2006-2011)	95
Table 7.6: Unemployment in Meath and Selected Other Parts of Ireland (2006-2011)	96
Table 7.7: Live Register Data in Meath County, Social Welfare Offices within Meath and Selected Other Parts of Ireland (July 2013-July 2014)	98
Table 7.8: Composition of Employment in County Meath and Selected Other Parts of Ireland (2011)	101
Table 7.9: Change in the Composition of Employment in County Meath and Selected Other Parts of Ireland (2006-2011)	102
Table 7.10: Population (2011) of the Electoral Divisions in Kells and Elsewhere in Meath Included in the New EU Regional Aid Map 2014-2020	111
Table 7.11: Number of Full-Time Students Enrolled in Higher Education Institutions (Universities and Institutes of Technology) by County of Permanent Address (Academic Year 2009/2010)	121
Table 7.12: Number of Full-Time and Part-Time Students Enrolled in HEIs in the Vicinity of County Meath and the State (2012/2013)	123
Table 7.13: Number of Full-Time International Students Enrolled in HEIs in the Vicinity of County Meath and in the State (2012/2013)	128
Table 7.14: Research and Knowledge Transfer Resources of HEIs in the Vicinity of Meath	129
Table 7.15: Research and Knowledge Transfer Activity of HEIs in the Vicinity of Meath	130
Table 7.16: Number of Jobs in County Meath by Place of Residence (2011)	133
Table 7.17: Educational Attainment among those at Work in County Meath by Place of Residence (2011)	133
Table 7.18: Socio-Economic Grouping of those at Work in County Meath by Place of Residence (2011)	134
Table 7.19: Economic Sectors of those at Work in County Meath by Place of Residence (2011)	136

Table 7.20: Age Distribution of those at Work in County Meath by Place of Residence (2011)	138
Table 7.21: Mode of Transport to Work among those Working in County Meath by Place of Residence (2011).....	139
Table 7.22: Place of Work of People Residing in County Meath (2011)	141
Table 7.23: Place of Work and Educational Attainment of People Residing in County Meath (2011) .	143
Table 7.24: Place of Work and Socio-Economic Grouping of People Residing in County Meath (2011)	144
Table 7.25: Place of Work and Economic Sectors of People Residing in County Meath (2011).....	145
Table 7.26: Place of Work and Age Distribution of People Residing in County Meath (2011).....	146
Table 7.27: Place of Work and Mode of Transport of People Residing in County Meath (2011)	146
Table 7.28: Extent of Outbound Commuting from Selected Settlements in County Meath (2011)	148
Table 7.29: Number of Enterprise Ireland High Potential Start Up (HPSU) Companies in Meath, Kildare and Wicklow (2014)	151
Table 7.30: Number of Enterprise Ireland Client Funding Approvals and Innovation Voucher Approvals in Meath, Kildare and Wicklow (2011-2013).....	152
Table 7.31: Permanent Full-Time Employment in Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)	153
Table 7.32: Summary of FDI Companies in Meath (2014).....	156
Table 7.33: Overseas Visitors to Ireland County-by-County (2012)	159
Table 7.34: Leading Visitor Attractions in County Meath (2008-2012)	161
Table 7.35: Serviced Accommodation in Meath (2013) – Hotel, Guesthouse and B&B Beds	162
Table 8.1: Tenets of the Economic Vision for County Meath	169
Table 8.2: Baseline Employment in Meath (2011) – Persons Employed, Age Profile and Educational Attainment	172
Table 8.3: Baseline Employment in Meath (2011) – Persons Employed and Socio-Economic Groups .	173
Table 8.4: Baseline Employment in Meath (2011) – Persons Employed and Sector	175
Table 8.5: Baseline Employment in Meath (2011) – Persons Employed and Agency-Assisted Firms....	176
Table 8.6: Summary of Economic Projections for the Irish Economy and Employment Growth Rates Used to Inform the Three Scenarios relating to the Economic Vision for Meath 2022 – Central, Optimistic and Pessimistic Scenarios	179
Table 8.7: Employment in the Category of National Strengths and Convergence Opportunities Sectors in Ireland (2007-2012)	185
Table 8.8: Employment and Export Performance of Sectors within the National Strengths and Convergence Opportunities Category	187
Table 8.9: Employment in the Category of Emerging Opportunities and Untapped Potential Sectors in Ireland (2007-2012).....	188

Table 8.10: Employment in the Category of Mature Sectors in Ireland (2007-2012)	190
Table 8.11: Employment in the Category of Domestically/Locally Traded Sectors in Ireland (2007-2012)	191
Table 8.12: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) – Agri-food and Manufacturing-related Activities	193
Table 8.13: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) – Construction, Wholesaling/Retailing and ICT/Professional/Financial Activities	194
Table 8.14: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) –Non-Market/Public Sector and Other Services Activities	195
Table 8.15: Summary of the Features and Potential Employment Uses of the Identified Sites in County Meath	217
Table 8.16: Illustrative Matrix for Assessment of the Delivery of the Sites in Meath.....	220
Table 8.17: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Central Scenario	227
Table 8.18: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Central Scenario.....	228
Table 8.19: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Optimistic Scenario	229
Table 8.20: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Optimistic Scenario.....	230
Table 8.21: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Pessimistic Scenario	231
Table 8.22: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Pessimistic Scenario.....	232
Table 8.23: Relevant Population Projections in 2022	233
Table 8.24: Projections of Persons Employed in County Meath by Sector in 2022 – Expected Value of Employment – Top Panel Shows Total Employment within Meath (Excluding Outbound Commuters) and Bottom Panel Shows Wider Employment (Inclusive of Outbound Commuters).....	237
Table 9.1: Key Messages to Communicate for Meath – Unique Selling Points.....	255
Table 9.2: Performance Monitoring of the Economic Development Strategy for Meath 2014-2022... 	260
Table 9.3: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – <i>Economic and Overall Strategic Actions</i>	262
Table 9.4: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – <i>Spatial Implementation Actions</i>.....	263
Table 9.5: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – <i>Marketing Actions to Promote Economic Development in Meath to Multiple Audiences</i>	263

Figure 8.4: Illustration of the Spatial Dimension of the Economic Vision for Meath	xiv
Figure 10.1: Schematic Illustration of Approach to the Economic Development Strategy for Meath .	xxii
Figure 1.1: Conceptual Map of County Meath	7
Figure 2.1: Map of the Proposed Regional Assembly Areas and Existing Regional Areas	19
Figure 2.2: Map Summarising the National Spatial Strategy (NSS) 2002-2020.....	21
Figure 2.3: Map of Dublin and the Mid-East Regions in the National Spatial Strategy (NSS) 2002-2020	23
Figure 2.4: Vision of Food Harvest 2020	30
Figure 3.1: Conceptual Map of the Regional Economic Strategy for the GDA.....	51
Figure 3.2: Map of the Meath Hinterland and Metropolitan Areas in the RPGs for the GDA 2010-2022	54
Figure 4.1: Core Strategy Map of Meath in the Meath CDP 2013-2019	63
Figure 5.1: New Regional Aid Map for Ireland (2014-2020) – Details of the Electoral Divisions in Meath Included in the Map	69
Figure 5.2: Competitiveness Landscape in Ireland and the Comparator Countries (2014).....	81
Figure 7.1: Map of Household Disposable Income per Head in Irish Counties (2011)	86
Figure 7.2: Ratio of Primary to Disposable Income per Head in County Meath (2000-2011)	87
Figure 7.3: Primary Income per Head in County Meath compared with Primary Income per Head in the State (2000-2011)	88
Figure 7.4: Income of Self-Employed per Head in County Meath compared with Income of Self-Employed per Head in the State (2000-2011) – <i>Fitted Trend Line in Bottom Panel</i>	89
Figure 7.5: Map of Population Change among Electoral Divisions (EDs) in County Meath (2006-2011)	91
Figure 7.6: Live Register Data in Meath County, Social Welfare Offices within Meath and Selected Other Parts of Ireland (March 2002-March 2014)	97
Figure 7.7: Map of Teagasc Index of the Economic Strength of Towns in Ireland (2011) – <i>Ranks of the Towns Assessed</i>	104
Figure 7.8: Map of the Electoral Divisions in Kells and Elsewhere in Meath Included in the New EU Regional Aid Map 2014-2020.....	110
Figure 7.9: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas</i>	114
Figure 7.10: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas and Foreign Languages</i>	115
Figure 7.11: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas and Social Sciences, Business and Law</i>	116

Figure 7.12: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas and Science, Mathematics and Computing</i>	117
Figure 7.13: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas and Engineering, Manufacturing and Construction</i>	118
Figure 7.14: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>All Subject Areas and Personal Services</i>	119
Figure 7.15: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – <i>Level of Third-Level Qualifications</i>	120
Figure 7.16: Percentage Distribution of Employment by Economic Sector in Meath, Dublin, the Mid-East Region and the State (2011)	137
Figure 7.17: Permanent Full-Time Employment in Irish-Owned Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)	154
Figure 7.18: Permanent Full-Time Employment in Foreign-Owned Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)	155
Figure 7.19: Revenue per Overseas Visitor (€) in Irish Counties (2012)	160
Figure 8.1: Summary of the Methodology used to Formulate the Economic Vision for Meath 2022 ..	170
Figure 8.2: Illustration of Employment Growth Projections for the Irish Economy (Used in the Formulation of the Economic Vision for Meath 2022)	180
Figure 8.3: Framework for Sectoral and Sub-Sectoral Employment Opportunities in Meath	183
Figure 8.4: Illustration of the Spatial Dimension of the Economic Vision for Meath	218
Figure 8.5: Projections of Persons Employed in County Meath in 2022 – Expected Value of Total Employment (Exclusive and Inclusive of Outbound Commuters) Based on the Three Scenarios	236
Figure 9.1: Illustration of the Composition of the Economic Action Plan for Meath	239
Figure 9.2: Schematic Illustration of the Marketing Plan for Meath 2014-2020	254
Figure 9.3: Schematic Summary of Target Audiences	256
Figure 9.4: Implementation of the Economic Development Strategy for Meath 2014-2022	258
Figure 10.1: Schematic Illustration of Approach to the Economic Development Strategy for Meath ..	264
 Box 2.1: New Approach to LEADER in Ireland	14
Box 2.2: How Local Authorities can Generally Assist Economic Development	16
Box 2.3: Summary of Ireland’s Next Phase of FDI Policy (Following the IDA Ireland’s Horizon 2020) ...	45
Box 2.4: Brief History of Key Industrial and Enterprise Development Initiatives in Ireland	46
Box 5.1: Example of the Significance of EU Funding for Irish Partners – Clare Wave Energy Project	72

Box 7.1: State Investment in Growth and Recovery – Phase 4 Infrastructure Stimulus.....	108
Box 7.2: New Inward Investment Announced for Kells (August 2014)	112
Box 7.3: PISA – International and Irish Evidence.....	126
Box 7.4: Praeger on Meath and the Boyne Valley	163
Box 7.5: Summary SWOT Analysis of the Local Meath Economy	166
Box 8.1: Guiding Principles of the Spatial Dimension to the Economic Development Strategy for Meath	197
Box 8.2: County Meath Urban Settlements Hierarchy and Role of Settlements	198
Table A1: Number of IDA Ireland Site Visits with Potential FDI Firms in Irish Counties (2008-2012)...	269
Table A2: Employment and Unemployment Performance in County Meath and Selected Other Parts of Ireland (2006-2011).....	272
Table A3: College Destinations of Pupils in Meath Secondary Schools who Sat the Leaving Certificate Examination in 2012.....	280
Table A4: Serviced Accommodation in Meath (2013) – Hotel Beds.....	281
Table A5: Serviced Accommodation in Meath (2013) – Guesthouse and B&B Beds.....	281
Table A6: Further Details on the Employment in the Category of National Strengths and Convergence Opportunities Sectors in Ireland (2007-2012)	282
Table A7: Further Details on the Employment in the Emerging Opportunities and Untapped Potential Sectors (2007-2012)	283
Table A8: Further Details on the Employment in the Category of Mature Sectors in Ireland (2007-2012)	284
Table A9: Further Details on the Employment in the Domestically/Locally-Traded Sectors in Ireland (2007-2012)	285
Table A10: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Central Scenario.....	300
Table A11: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Central Scenario.....	301
Table A12: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Central Scenario.....	302
Table A13: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Optimistic Scenario	303
Table A14: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Optimistic Scenario	304
Table A15: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Optimistic Scenario	305
Table A16: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Pessimistic Scenario	306

Table A17: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Pessimistic Scenario	307
Table A18: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Pessimistic Scenario	308
Figure A1: Map of the Greater Dublin Area (GDA) in the Dublin Regional Planning Guidelines 2010-2022	265
Figure A2: Map of Regional Innovation Performance in Europe (2010).....	270
Figure A3: Ratio of Primary Income to Disposable Income in Meath and Other Irish Counties (2011)	271
Figure A4: Trends in Self-Employed Income in Meath and the State (2000-2011) (2000 Base Year=100)	271
Figure A5: Chart Illustrating the National Framework of Qualifications.....	272
Figure A6: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas	273
Figure A7: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Foreign Languages.....	274
Figure A8: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Social Sciences, Business and Law	275
Figure A9: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Sciences, Mathematics and Computing	276
Figure A10: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Engineering, Manufacturing and Construction	277
Figure A11: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Personal Services	278
Figure A12: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – Level of Third-Level Qualifications	279
Box A1: Examples of Local Authority Direct Role in Promoting Economic Development	266
Box A2: Traditional ‘Mainstream’ Local Government Functions Relevant to Economic Development	267
Box A3: Local Authority Leadership, Co-ordination and Mobilisation of Economic Development Efforts	268
Box A4: Profiles of, and Prospects for, Specific Sectors – <i>Agri-Food</i>	286
Box A5: Profiles of, and Prospects for, Specific Sectors – <i>ICT</i>	287
Box A6: Profiles of, and Prospects for, Specific Sectors – <i>Med-Tech</i>	288
Box A7: Profiles of, and Prospects for, Specific Sectors – <i>Pharma-Chem</i>	289

Box A8: Profiles of, and Prospects for, Specific Sectors – <i>International Financial Services</i>	290
Box A9: Profiles of, and Prospects for, Specific Sectors – <i>International Business Services</i>.....	291
Box A10: Profiles of, and Prospects for, Specific Sectors – <i>Engineering/Manufacturing/Mining</i>.....	292
Box A11: Profiles of, and Prospects for, Specific Sectors – <i>Tourism and Hospitality</i>	293
Box A12: Profiles of, and Prospects for, Specific Sectors – <i>Retail and Wholesale</i>	294
Box A13: Profiles of, and Prospects for, Specific Sectors – <i>Transport, Logistics and Distribution</i>.....	295
Box A14: Profiles of, and Prospects for, Specific Sectors – <i>Property and Construction</i>.....	295
Box A15: Profiles of, and Prospects for, Specific Sectors – <i>Green and Clean-Tech</i>	296
Box A16: Profiles of, and Prospects for, Specific Sectors – <i>Arts, Entertainment and Recreation</i>.....	297
Box A17: Profiles of, and Prospects for, Specific Sectors – <i>Education (Public and Private)</i>.....	298
Box A18: Profiles of, and Prospects for, Specific Sectors – <i>Domestically/Locally-Traded Services</i>	299

Preface

This report incorporates a substantial amount of work in the form of relevant economic data analysis, spatial assessment and consideration of the importance of promoting County Meath to help ensure it fulfils its economic potential in the coming years. It also reflects the extensive stakeholder consultations carried out as part of the study. Owing to the significantly changed policy environment, notably the enhanced role for local authorities regarding economic development, we also present extended commentary of the relevant policy contexts (nationally, regionally and locally) and economic developments, including those affecting foreign direct investment (FDI) – a key issue for Meath.

The Key Messages overleaf provide a succinct synopsis of the report; the Executive Summary following that offers an extended summary; but it is hoped that readers will take time to make their way through the main body of the report, where the detailed facts and evidence, and commentary, are presented.

In recent weeks, the ‘political cycle’ in respect of the next General Election has commenced and a new series of bullish projections for the Irish economy have been issued. If these projections eventuate, then the envisaged employment impact for Meath will be even greater than estimated here (our projections were completed in September 2014, before the buoyant forecasts were released). However, as history shows, there is no guarantee that the recently released projections, or any projections, will occur, and considerable uncertainty and risks remain for the Irish economy – externally and internally. These risks apply as much to Meath as any other part of the country.

In particular, Ireland remains challenged by competitiveness issues, which still require attention. While inflation or the rate of growth of prices across the economy remains low, the *level* of prices, and costs, in the country remain unacceptably high and this is hurting both new and existing businesses, and thus inhibiting more sustainable jobs from being created. The sources of the high prices and costs include government, or more widely public sector, actions (innocently or inadvertently) and, while the authorities are aware of these, more needs to be done to tackle them. The availability of reliable, high-speed broadband in rural areas remains an issue. In respect of scientific and technological innovation, Ireland lags behind comparable countries, and emerging economies continue to escalate their efforts in research, development and innovation. The ending of the so-called ‘Double Irish’ tax loophole in Budget 2015 (announced on 14 October 2014) is also noteworthy – the loophole basically added to the attraction provided by Ireland’s low corporation tax rate, which, to be clear, is not under threat. The reform of the corporation tax system under the OECD’s BEPS (Base Erosion and Profit Shifting) is being carefully monitored by the Irish authorities (the 12.5% corporation tax rate will remain central to Ireland’s FDI package) and the country is cooperating with the OECD in the process (the BEPS review, with recommendations, is due to conclude by the end of next year). Another worry, which echoes the pre-crisis years, is that the Irish economy is (again) moving ‘out of synch’ with the euro zone, which continues to exhibit sluggish growth, and Europe more widely continues to struggle with competitiveness.

Against this wider economic backdrop, local authorities are today expected to play a greater and more proactive part in assisting economic development and job creation. While local government do employ people, their principal overall role in economic development is to facilitate the environment conducive to enterprise development and job creation – working with, rather than against, businesses, developers and wealth creators. Meath County Council recognises these key challenges, which it views appropriately enough as opportunities, and it is approaching the process positively from the standpoint of improving the county from a social/community perspective as well as economically.

Dr. Pat McCloughan, Consultancy Team Project Manager

Key Messages

- + Meath is a fundamentally prosperous county with a number of innate comparative advantages and the economic performance of the county is stronger than most other parts of the country.
- + However, the current economic model is unlikely to be sustainable and is at variance with the current Meath County Development Plan (CDP) (as varied), which envisages a more dynamic and vibrant local economy supporting sustainable communities throughout the county.
- + Manifestation of Meath not fulfilling its economic potential takes a number of forms, including:
 - o Narrow base of economic activities in largely traditional areas;
 - o Low penetration of knowledge-oriented activities;
 - o Low educational attainment (among those working *within* the county);
 - o FDI deficit – the proportion of jobs in Meath accounted for by agency-assisted foreign-owned firms is less than half the corresponding figure for the country as a whole;
 - o Substantial skills leakage in the form of the large cohort of outbound commuters.
- + Meath could very well continue with the predominantly passive economic model and still perform reasonably well during the coming years – where outbound commuting would continue to grow and the county would become even more reliant on Dublin, Dundalk and Kildare for large-scale knowledge-based employment. In the process, Meath would become an even bigger satellite location or ‘commuter county’, while expanding economically, but sub-optimally so.
- + Clearly, in commissioning this study, and having regard to the significant changes put in place in the past year or so, Meath County Council wishes to see, and deliver, greater retention of economic impact in the county in support of the overall vision provided for in the Meath CDP.
- + The many stakeholders with whom the consultancy team engaged during the assignment share this aspiration for the county and/or believe that greater retention of economic impact within the county is warranted and feasible.
- + With economic recovery underway, we are in little doubt that employment will be created in Meath between now and 2022 (although this is not to deny the damage caused by the recession and the still high costs of doing business nationally).
- + A particular challenge, or rather opportunity, is to broaden Meath’s economic base by growing the share of employment taken up by knowledge-oriented activities (indigenous and foreign).
- + To help achieve this, Meath can harness certain unique selling points, in the context of its being part of the Greater Dublin Area (GDA), namely its substantial commuter resource and the fact that locating in the county opens up the prospect of an even larger skills pools by virtue of Meath’s proximity to the capital and its excellent transport links with Dublin.
- + These USPs need to be emphasised in the context of Meath being a *cost-competitive* business location and the activities that can be grown in the county include international financial and business services, call centres, shared services centres, medical technologies and ICT (software).
- + In enabling the ‘Economic Vision’ formulated in this report, the planning and economic development model in the county needs to change, from one that has tended to emphasise residential/housing and that has taken a largely passive approach to a more proactive stance;
- + Particular targets specified here relate to self-employed income across all business types in the county and the employment shares of larger indigenous and FDI firms.
- + Lead responsibility for implementation, and monitoring, of the Economic Development Strategy will rest with Meath County Council, supported and advised by the Meath Economic Forum and the Meath Strategic Policy Committee – Planning and Enterprise.

An ambitious yet achievable Economic Vision for Meath; with proactive, living and workable Actions, and ongoing Monitoring and Appraisal.

Executive Summary

Purpose of the Report

This report for Meath County Council is prepared by a multidisciplinary consultancy team comprising PMCA Economic Consulting, FTI Consulting and John Spain and Associates. It provides a comprehensive, evidence-based Economic Development Strategy for County Meath for the period 2014-2022.

The brief for the assignment was to provide Meath County Council with clear, concise, innovative and evidence-based measures aimed at accelerating the economic transformation, revitalisation and sustainable development of County Meath during the period. The measures recommended in this report are directed at enabling the county to fulfil its economic potential and to prosper as a successful, diverse and vibrant social, civic, commercial, and residential centre that will be recognised locally, nationally and internationally as a highly attractive and distinctive location in which to conduct business.

The actions arising from the work undertaken are summarised in tabular form at the end of the Executive Summary. As well as the actions, the targets to which the Economic Development Strategy will aim are also succinctly specified in the report.

Structure of the Main Body of the Report

This large and extensive report represents the culmination of relevant data assembly and analysis, and engagement with a large number of stakeholders, within and outside the county. The brief required that we also consider the radically changed policy environment relating to the more proactive role for local authorities in respect of economic development. Accordingly, the first set of sections of the report deal in some detail with the national, regional and local policy contexts, together with relevant economic developments, including in regard to foreign direct investment (FDI).

The structure of the main body of the report is as follows:

- Section 1 states the purpose of the study and reproduces the terms of reference, and also provides a distillation of the key opportunities and issues for economic development in the county in the coming years;
- Sections 2, 3 and 4 outline the national, regional and local policy contexts of the Economic Development Strategy respectively before Section 5 considers the European policy context and relevant economic developments, and then Section 6 draws the background/contextual pieces together in a short half-page summary;
- Section 7 provides a focused evidence-based economic profile of County Meath, drawing on a range of information sources to synthesise the key facts and trends on the county's *relative* economic performance;
- We then set out the 'Economic Vision' and its spatial expression for Meath 2022 in Section 8, which includes different economic scenarios for employment growth and projections of the composition of employment by sector in that year;
- Based on the preceding section, Section 9 proceeds to present the Economic Actions, Spatial Actions and Marketing Actions, and provides clear proposals for implementing and monitoring the Economic Development Strategy;
- Finally, Section 10 concludes the report.

Consultancy Team's Overall Assessment of the Local Meath Economy

Meath is a county having tremendous economic development potential, owing to its favourable location as part of, and infrastructural links with, the Greater Dublin Area (GDA), which comprises the four local authority areas making up the Dublin Region (namely Dublin City, Fingal, South Dublin and Dún Laoghaire-Rathdown) along with the counties of the Mid-East Region (Kildare and Wicklow as well as Meath). The advantages enjoyed by Meath mean that enterprises based in the county have access to a vast talent pool of skills, and to national and international markets. In both respects, Meath is blessed with greater economic advantages and opportunities than most other parts of Ireland.

However, while Meath is a fundamentally prosperous location, and the evidence shows this, there is a strong enough sense that it has not fulfilled its economic potential over the years – conveyed in our consultations with key stakeholders as well as reflected in the empirical evidence that we have reviewed and analysed. This is manifest in the comparatively narrow economic base of the county, in which Meath does well in regard to a small number of activities, including agriculture (for which the county is famed near and far) and traditional manufacturing like engineering and mining. But the extent of market-led knowledge activities is comparatively low in the county and there is a substantial 'leakage' in the form of outbound commuting and retailing (more specifically 'comparison' shopping as opposed to convenience shopping, which occurs locally). Moreover, while Meath is host to a number of highly valued foreign-owned employers, located in different parts of the county, FDI remains low (inquiries and site visits by potential inward investors have been very low, and FDI job announcements as well as the proportion of all employment in the county accounted for by foreign-owned firms are small).

Supporting this assessment of the local economy is the fact that educational attainment is lower in Meath than elsewhere in the country: in particular, the proportion of people with third-level or higher educational attainment is lower in Meath than elsewhere in the GDA and in the State, and this finding applies whether we take all residents, residents of working age or those at work within the county (i.e. the relatively low third-level or higher educational attainment rate in Meath is robustly established from our data analysis, and may be explained as a function of the narrow economic base characterising the county and the comparative paucity of knowledge-based employment therein).

We doubt whether Meath County Council, or any other body or person living in, or with connections to, the county would wish to see continuation of the sub-optimal performance of the local economy in the years ahead, even though Meath is generally in better shape economically than many other parts of the country. The reaction from our consultations is that Meath's status as a commuter county in the orbit of the capital is unsustainable and should be addressed urgently.

Planning for Enhanced Economic Performance in Meath

The good news from this report is that enhanced economic performance in Meath can be achieved in practice – although it will take a substantial amount of effort coupled with smart, prioritised actions.

In particular, we consider that the county has the qualities to become a highly competitive location for enterprises – indigenous and foreign-owned.

On the indigenous front, small businesses in Meath have traditionally performed better compared with the country as a whole but since the onset of the crisis after 2007 there has been a downward trend in self-employed income per head in the county. In line with the recovery now underway, we anticipate reversal of the trend in this important metric and it will be important that Meath County Council, Meath Local Enterprise Office (LEO) and other public agencies active in business support locally cater towards supporting their needs in the coming years (demand-led as opposed to supply-led business support).

The same principle applies in respect of larger Irish-owned enterprises in Meath, where the evidence is more positive and shows that the county has out-performed the State: the proportion of all employment within the county accounted for by agency-assisted (Enterprise Ireland) indigenous firms is appreciably higher than that for the country as a whole and there has occurred strong growth in this form of employment in recent years. Meath is home to a number of successful large Irish-owned companies and the Economic Development Strategy is mindful of the role that these important enterprises play locally – currently and in the years ahead.

Linking the smaller and larger indigenous businesses, the business support environment locally needs to be proactive in facilitating the growth process and this will mean building relationships between Meath County Council and Meath LEO, on the one hand, and Enterprise Ireland, on the other, to ensure that small, ambitious firms, with the potential and ability to grow, are supported in respect of building new markets (including exporting) and have access to the innovation and other supports that they need.

While Meath performs relatively strongly in regard to indigenous industry development, the same cannot generally be said for FDI – although we are very conscious of the fact that the county is host to a number of successful foreign-owned enterprises that make a significant contribution to the local economy. Meath needs more of these firms – that is *the* challenge or rather opportunity for this Economic Development Strategy (perhaps the most important opportunity).

We have a pretty clear understanding of the types of FDI can be grown in the county and it includes the internationally-traded services and high-tech manufacturing already present in Meath and which are being successfully grown in other locations in the country. The opportunity for Meath is to gain a larger share of the incoming investment into Ireland. 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. These are considered in detail in the spatial assessment component of the Economic Vision in Section 8.

To get some more of a sense of Meath's economic potential, consider, for example, the following facts on the 'outbound commuters' from the county, arising from our analysis of specialised data obtained from the Central Statistics Office (CSO), namely the POWSCAR conducted as part of Census 2011 (Place of Work, School or College – Census of Anonymised Records):

- There were about 33,000 people living in Meath but working outside the county in 2011;
- This number of workers exceeded (a) the number of people both living and working in the county in that year (namely around 28,500) and (b) the number of people from outside the county working in Meath or the 'inbound commuters' (c. 10,500);
- Thus, the outbound commuters represent the largest part of the local labour market in Meath;
- Put another way, these workers represented almost 54% of all residents of the county at work in any location in that year;
- Outside of the capital, no other local authority area in the country had more than half of its residents at work outside its territory in 2011 (we would expect commuting among the four local authority areas of Dublin to be high in any event);
- Proportionately speaking, it may therefore be inferred that Meath is the largest commuting county in the country (at least it was in 2011);
- About 25,000 or 76% of the outbound commuters were working in Dublin in 2011 and the number of Meath residents working in the capital alone was almost as big as the number of residents of the county working within Meath at the last census (about 28,500);

- The outbound commuters have the strongest educational attainment among the categories of worker in Meath – in 2011, over 41% of the outbound commuters had third-level or higher educational attainment, compared with 25% among those both living and working in Meath and 37% among the inbound commuters to Meath, and the corresponding proportion for the State was 38% in that year;
- In terms of the socio-economic groupings or skills of the outbound commuters, the following facts are noteworthy;
 - The number of commuters working as *employers and managers* outside the county in 2011 (7,438) exceeded the corresponding number working within the county (6,115 made up of 4,230 employers and managers both living and working in Meath and 1,885 inbound employers and managers)
 - The number of commuters working as *higher professionals* outside Meath in the same year (2,859) was greater than the corresponding number working within the county (namely 2,089, this being the sum of 1,289 higher professionals both living and working in Meath and 800 higher professionals among the inbound commuters to the county)
 - The number of commuters working as *lower professionals* outside the county in 2011 (6,086) surpassed the corresponding number working within Meath (5,759, comprising 3,856 lower professionals who were both living and working in the county and 1,903 inbound lower professionals)
 - In addition to the above, there were more outbound commuters classified as *non-manual workers* (9,620) compared with non-manual workers both living and working in Meath in 2011 (8,324)
 - Furthermore, there was a larger number of outbound commuters employed as *manual skilled workers* (2,886) compared with non-manual workers both living and working in Meath in that year (2,415)
- The number of outbound commuters working in the information and communication, financial, real estate, professional, administration and support service activities sector in 2011 (namely 7,771 or 24% of the total number of outbound commuters) far exceeded the corresponding number in respect of those both living and working in Meath (3,262 or 11.5% of the respective total) and the inbound commuters (1,421 or 13.7% of the respective total) (the corresponding proportion of those at work countrywide was 18.5%);
- The proportion of the outbound commuters aged between 20 and 44 years in 2011 was 71%, compared with 59% among those both living and working in Meath in that year; and
- The highest rates of outbound commuting at town level in Meath occurred in those settlements closest to the capital and/or with multi-modal transport access to Dublin;
 - Drogheda (South) (outbound commuting rate of 91.9%) (although this figure also includes some residents of that part of Drogheda working in the Louth part of the town – but most of the outbound commuters from Drogheda work in Dublin)
 - Clonee (89.5%)
 - Ratoath (87.3%)
 - Dunboyne (85.5%)
 - Ashbourne (83.1%)
 - Dunshaughlin (77.2%)
 - Trim (55.6%)
 - Kells (53.6%)
 - Navan (46.1%).

The outbound commuters, along with those both living and working in Meath and the inbound commuters, delineate the *immediate* labour market relating to the county and the facts presented above serve to illustrate the wide range of skills available to businesses, prospective and existing, and overseas as well as domestic. But the range of skills for inward investment is even greater again, when the *regional context* is taken into consideration. Given Meath's favourable location and excellent transport links in relation to Dublin, the effective labour/skills pool from which companies may recruit is much larger again and this too needs to be part of the overall offering of the county, not least in respect of FDI. For example, if one considers the principal economic centres in the county – Navan, Drogheda, Dunboyne, Kells and Ashbourne – the catchment population within a 45-minute drive-time is close to or exceeds 1 million and the proximity to major national infrastructure (in the form of Dublin Airport and Dublin Port) gives these settlements, and the county more widely, excellent access to international markets, in respect of traditional and light-weight goods.

There are approximately one million workers in the wider hinterland of County Meath with skills in social sciences, law and business, maths, life sciences, engineering and languages, not to mention tens of thousands of overseas nationals with European, Asian, Arabic and African languages fluencies in the vicinity of the county. These skills and competencies are essential requirements in respect of Ireland's FDI model and Meath's benefits from having them in abundance – when looked at in this manner.

Communicating the county in this way – as a cost-competitive location within the most economically advantageous and important region of the country – needs to form an essential part of promoting Meath for inward investment. This aspect of the Economic Development Strategy for Meath is consistent with the MERA Action Plan 2013 (MERA being the Mid-East Regional Authority, comprising Counties Kildare and Wicklow as well as Meath). The MERA Plan advocated FDI and strategic sites as a key part of the region fulfilling its economic potential and both are central to the plan under consideration here.

Economic Vision for Meath 2022

The consultancy team's formulated 'Economic Vision' for County Meath at 2022 includes specification of the projected number of jobs that can be achieved in that year, the sectors and sub-sectors in which they will occur and the locations within the county where they can arise.

As the nation's principal policy priority, jobs feature centre-stage in the Economic Vision.

The high-level tenets of the Economic Vision are presented in the table overleaf and, in designing them, we have been mindful of the overall vision for County Meath annunciated in the current Meath County Development Plan 2013-2019 (as varied), namely:

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

Tenets of the Economic Vision for County Meath

1. *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.*
2. *Seamless access to skills, infrastructure and services, and markets (international and national).*
3. *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.*
4. *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.*
5. *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.*
6. *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.*
7. *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).*

Source: This table is reproduced from Table 8.1 (p. 169 of the main body of the report).

The consultancy team's specification of the Economic Vision has proceeded in four steps:

- Baseline employment – informed by our detailed analysis of the CSO POWSCAR data 2011;
- Inputs to the projected level of employment in Meath in 2022, incorporating;
 - National economic projections, informed by the employment growth projections for Ireland contained in the International Monetary Fund's (IMF's) World Economic Outlook (WEO), 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)
 - Assessment of sectoral and sub-sectoral prospects and opportunities, using various data from the Department of Jobs, Enterprise and Innovation and Forfás as well as from the CSO and the consultancy team's own intelligence sources
 - Spatial assessment, where we have identified sites for potential employment purposes around the county whilst mindful of the economic/settlement hierarchy in the Meath CDP (as varied) (we liaised with Meath County Council in our consideration of the sites)
- Projected levels of employment in 2022 for each of three economic scenarios (central, optimistic and pessimistic); and

- Further validation of the projected employment levels, where we have made 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 our projections.

For each of the three scenarios – central, optimistic and pessimistic – there are two factors giving rise to the employment projections: firstly the rate of growth of employment; and secondly whether there will be sectoral change or not. In particular, there are three rates of employment growth associated with the three scenarios – in the pessimistic scenario, employment growth will be ‘low’ and will be ‘medium’ and ‘high’ in the central and optimistic scenarios respectively. The low, medium and high employment growth rates are informed by the national projections and sectoral opportunities.

Turning to sectoral change, the pessimistic scenario assumes that there will be no change to the composition of employment in Meath in 2022 (i.e. it will be the same as in 2011, only with a little more employment as determined by the low employment growth rate). On the other hand, the central and optimistic scenarios allow for sectoral change – the difference between them is that there will be a greater quantum of additional employment in the optimistic scenario.

The sectoral change aspect of the employment projections is important because it admits the opportunity for Meath to broaden its employment base as well as creating more jobs between now and 2022. The most important sectoral change will occur in ICT and professional services (internationally-traded services), which we believe can be achieved. There will also inevitably be a shift in the percentage share of employment attributed to construction but this should be small, in order to avoid the situation that occurred prior to the onset of the economic crisis from 2008, when the property bubble and construction work were absorbing an unsustainable proportion of the labour force.

While it is fashionable, yet relevant, in the current climate to highlight employment opportunities in high-tech manufacturing and internationally-traded services, it is also important not to forget the many other sectors for which there will be employment opportunities during the medium-term (2014-2022). These include manufacturing, retailing and wholesaling, food service/accommodation/tourism and locally/domestically-traded services (e.g. retail banking, insurance, traditional professional services etc.).

Employment Projections for the Economic Vision for Meath 2022 – Total and Sectoral Split

The chart below shows the expected outcomes in respect of total employment growth in County Meath between 2011 (the baseline year, in which we have full information on the local economy of Meath from Census 2011) and 2022 where we illustrate the extent of growth 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 estimated outcomes shown in the graph reflect the three employment growth scenarios – namely the central, optimistic and pessimistic scenarios *simultaneously* – that we have modelled and are derived based on our assessment of the probabilities of the scenarios occurring, namely:

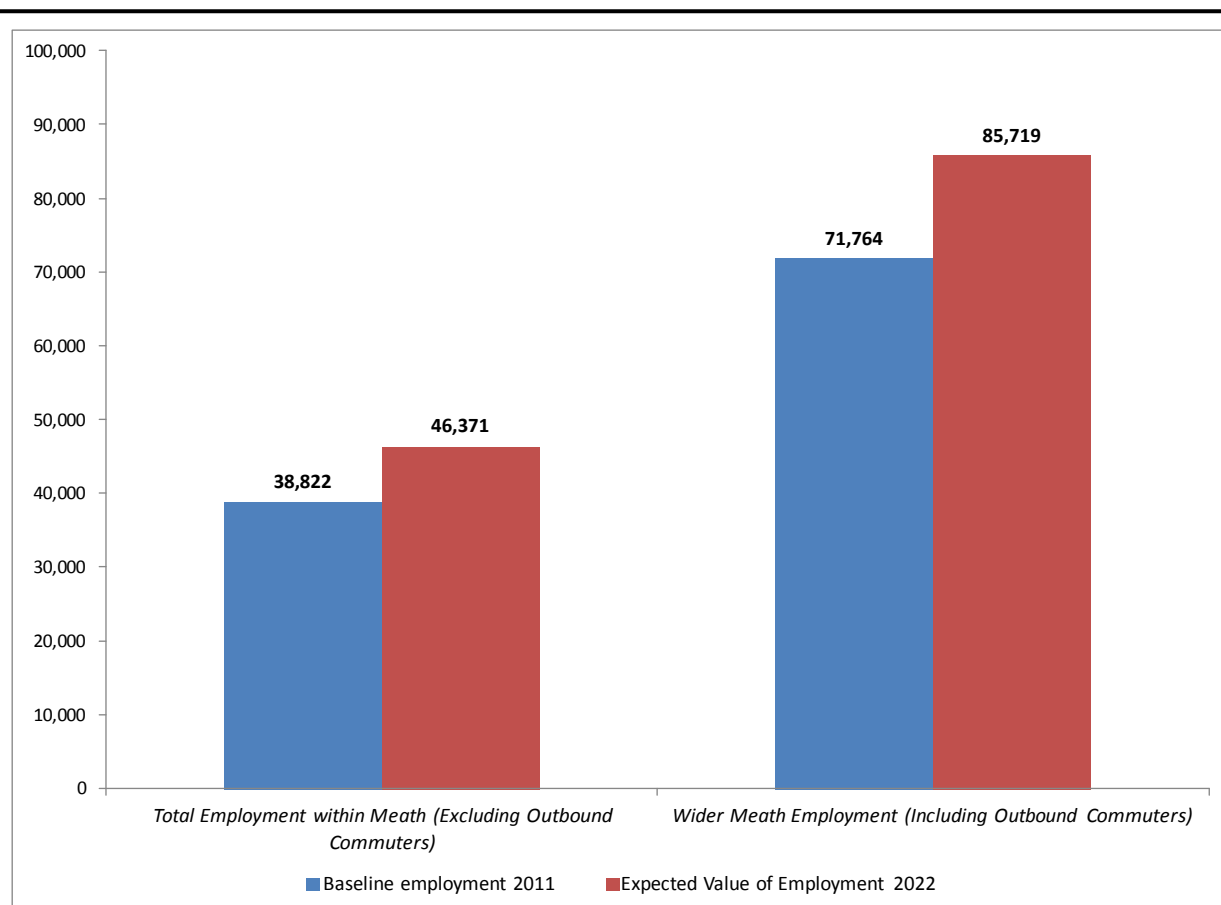
- Central scenario – 50% probability of occurrence;
- Optimistic scenario – 35% probability; and
- Pessimistic scenario – 15% chance of happening.

The details of the three scenarios and the derivation of the expected employment outcome in 2022, which incorporates the three scenarios simultaneously using the assigned probabilities as weights, are outlined in Section 8 of the main body of the report.

The overall employment projections using the expected value formula are illustrated in the chart below, which shows the following:

- The number of jobs within Meath (i.e. among those both living and working in the county and the inbound commuters working in the county) 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 (i.e. including the outbound commuters as well as those both working and living in Meath and the inbound commuters) 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).

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



Source: This chart is reproduced from Figure 8.5 (p. 236 of the main body of the report).

Executive Summary

The table below shows the composition of the expected level of employment by sector in 2022 and comes in two parts: the top panel shows the expected value of total employment *within* Meath by sector; and the bottom panel shows the expected value of wider Meath employment by sector respectively. The former excludes and the latter includes the outbound commuters.

Projections of Persons Employed in County Meath by Sector in 2022 – Expected Value of Employment Based on the Central, Optimistic and Pessimistic Scenarios – Top Panel Shows Total Employment *within* Meath (Excluding Outbound Commuters) and Bottom Panel Shows Wider Employment (Inclusive of Outbound Commuters)

Total Employment within Meath		Persons Employed				CAGR
		2011	%	2022	%	
Total		38,822	100.0%	46,371	100.0%	1.6%
1	Agricultural, forestry & fishing	2,862	7.4%	3,419	7.4%	1.6%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	5,514	14.2%	6,586	14.2%	1.6%
3	Construction	1,719	4.4%	2,084	4.5%	1.8%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	11,180	28.8%	13,354	28.8%	1.6%
5	Information and communication, financial, real estate, professional, administration and support service activities	4,683	12.1%	6,154	13.3%	2.5%
6	Public administration and defence; compulsory social security	2,395	6.2%	2,861	6.2%	1.6%
7	Education, human Health and social work activities	8,149	21.0%	9,734	21.0%	1.6%
8	Other service activities	1,751	4.5%	2,092	4.5%	1.6%

Wider Meath Total Employment		Persons Employed				CAGR
		2011	%	2022	%	
Total		71,764	100.0%	85,719	100.0%	1.6%
1	Agricultural, forestry & fishing	3,087	4.3%	3,687	4.3%	1.6%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	9,700	13.5%	11,586	13.5%	1.6%
3	Construction	2,711	3.8%	3,269	3.8%	1.7%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	20,071	28.0%	23,974	28.0%	1.6%
5	Information and communication, financial, real estate, professional, administration and support service activities	12,454	17.4%	15,594	18.2%	2.1%
6	Public administration and defence; compulsory social security	5,367	7.5%	6,411	7.5%	1.6%
7	Education, human Health and social work activities	14,785	20.6%	17,660	20.6%	1.6%
8	Other service activities	2,867	4.0%	3,425	4.0%	1.6%

Source: This table is reproduced from Table 8.24 (p. 237 of the main body of the report).

Noteworthy in each panel of the table above are the absolute growth in employment in every sector and the higher employment share attributed to the key sector of *information and communication, financial, real estate, professional, administration and support service activities*.

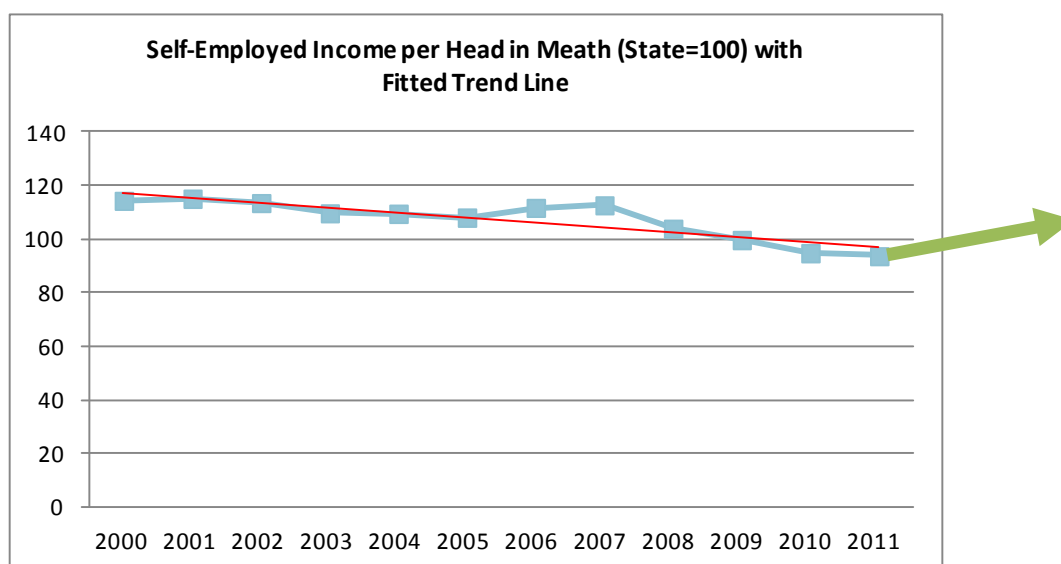
Comparing the projections between the two panels of the table, it is seen that the bigger employment gain for this important sector (i.e. *information and communication, financial, real estate, professional, administration and support service activities*) will occur *within* County Meath (compound annual growth rate or CAGR of 2.5% versus CAGR 2.1%), meaning that growing this sector (in both absolute and share terms) will be central to the goal of retaining more economic impact *within* the county by 2022. These changes are circled in the table.

Indicative Key Targets for the Economic Development Strategy to Seek to Achieve

In light of the anticipated employment growth in Meath, the following are the key targets to which the Economic Development Strategy should seek to achieve by 2022:

- Indigenous enterprise development;
 - Reverse the downward trend of recent years in respect of the ratio of self-employed income per head in Meath versus the State so that the ratio favours Meath (see the graph overleaf for illustration of the downward trend to 2011, which is the latest year for which the data are available)
 - 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) (see the table after the graph overleaf)
- 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) (see the table after the graph overleaf).

Income of Self-Employed per Head in County Meath compared with Income of Self-Employed per Head in the State (2000-2011) with Targeted Trend towards 2022



Source: This chart is reproduced from Figure 7.4 (p. 89 of the main body of the report).

Persons Employed and Agency-Assisted Firms in Meath (2011) with Targeted Trends towards 2022

Statistic/Variable	Total Employment within Meath (2011)
Persons	38,822
Agency-Assisted Enterprises	
Indigenous/Irish-Owned	4,654
State	12.0%
	8.0%
Foreign-Owned	1,140
State	2.9%
	7.9%
All-Agency Assisted	5,794
State	14.9%
	15.8%

Source: This chart is reproduced from Table 8.5 (p. 176 of the main body of the report). The boxed cell indicates advantage in favour of Meath relative to the State.

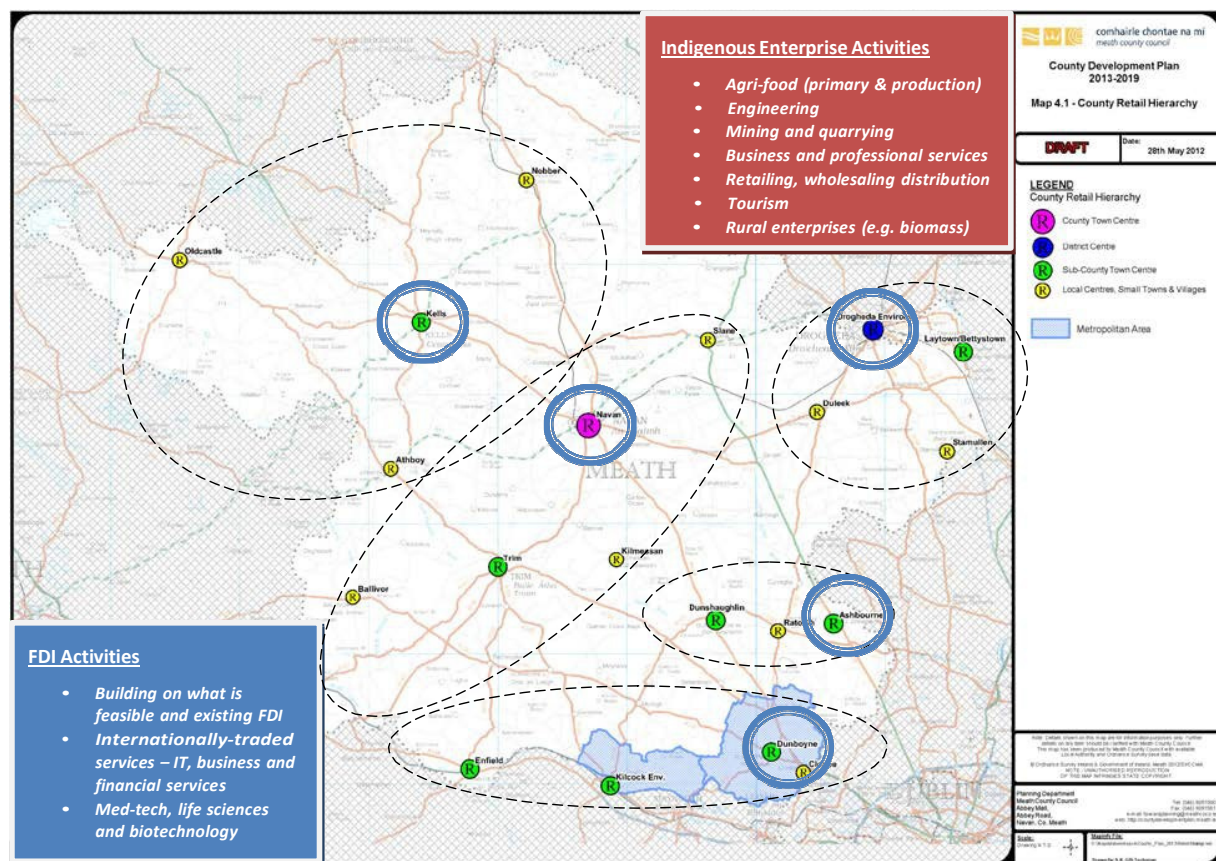
Spatial Expression of the Economic Vision

The map below illustrates the spatial dimension of the Economic Vision for Meath (2022). It incorporates both the assessment of the identified sites for employment around the county and the sectors/activities that can be developed. The map is consistent with the economic hierarchy contained in the Meath CDP (as varied). The details of the site assessment and the other components of the Economic Vision are set out in Section 8 of the main body of the report.

Shown in the map (dotted rings) are the approximate wider areas in which the sites occur and the circled urban centres will act as the focal points of the catchment areas, with the other settlements within the areas benefitting in the process and ultimately the county as a whole.

The principal towns and their attendant settlement areas are currently host to a range of activities, including professional and skilled service provisions, retailing, banking, administration, health and education, and housing. It is appropriate that they will provide the focal points for FDI and indigenous industry development, with the rest of the county benefiting accordingly.

Figure 8.1: Illustration of the Spatial Dimension of the Economic Vision for Meath



Source: This map is reproduced from Figure 8.4 (p. 218 in the main body of the report).

The map above includes delineation of the Metropolitan Area of Meath, namely the shaded area in-and-around Dunboyne in the south of the county. As part of the requirements of this study, the consultancy team considered the possibility that the Metropolitan Area would be expanded in future regional/national plans (the current Metropolitan Area of Meath, as illustrated in the map above, is in accordance with the current Regional Planning Guidelines for the GDA, which span the time period 2010-2022). It is doubtful, in our view, that the current Metropolitan Area would be extended between now and 2022. The question might be asked as to the rationale of such a proposal, in view of any progress made to the existing Metropolitan Area – which has been predominantly residential. Longer-term, and in view of the envisaged economic development of Ashbourne, Dunshaughlin and Ratoath, as well as of Dunboyne and its environs, as provided for in this report, a stronger case may be advanced to widen the Metropolitan Area to include these additional settlements and their environs. Until then, we do not think that it would be a productive use of resources to seek to attempt to extend the Metropolitan Area until the current Metropolitan Area around Dunboyne is successfully developed economically, along with the area around Ashbourne, Dunshaughlin and Ratoath, which is the intention of the Economic Development Strategy for Meath 2014-2022.

As part of the sites assessment, the consultancy team also considered the possibility of delivering the proposed regional hospital for the North East in Navan. We examined the needs study of 2006, the selection of Navan study of 2008 and the sites/planning study of 2009, which is inconclusive and ambiguous. An added issue concerns the continued constraints on the public finances and the scope to assign spending towards such a possibility during the lifetime of the Strategy. It would be difficult to envisage a private or public-private development in this case (private involvement in hospital provision in Ireland has tended to be limited to tertiary services and confined largely to Dublin and the other cities). Accordingly, it is most likely that the proposed hospital would be developed under the auspices of the Health Service Executive (HSE) (assuming a suitable site could be identified that meets both planning and health services requirements). The possibility of a regional hospital at Navan is included among our spatial assessment but may not have the same delivery potential as the other employment sites considered, including the IDA parks at Navan and Drogheda, which currently have substantial spare capacity (over 20 hectares in each case), and the sites in Pace (Dunboyne), Kells and Ashbourne etc.

Tabular Summary of Proposed Actions for the Economic Development Strategy

Overleaf are tabulated eight (8) practical and workable actions designed to achieve the projected level of employment growth in Meath by 2022 and the key targets in respect of indigenous and FDI enterprises as indicated above.

The actions are split into three groups as follows:

- Economic/Strategic Actions (4), including;
 - Internal audience engagement
 - External audience engagement – business support agencies and businesses themselves
 - Economic activities/clusters in the economic centres (as shown in the map above)
- Spatial Actions (3), including;
 - Infrastructure and services on the identified sites
 - Site delivery mechanisms
- Marketing Actions, comprising
 - A variety of instruments designed to promote the county to various audiences, taking account of existing campaigns and brands for Meath, which should be maintained.

The details of all actions are presented in Action 1-Action 8 (pp. 246-257 of the main body of the report).

Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – Economic and Overall Strategic Actions

Action	Responsibility and Commencement
<i>Internal Audience Engagement</i>	
1. Adoption, dissemination and practice of the Economic Development Strategy for County Meath 2012-2022 at all levels within and across Meath County Council, including among elected representatives as well as officials of the Council.	Responsibility with the CEO and Directors of Services at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
<i>External Audience Engagement</i>	
2. Proactive engagement between Meath County Council and the State agencies – IDA Ireland (FDI), Enterprise Ireland (indigenous businesses) and Fáilte Ireland (tourism), and with Meath LEO (local entrepreneurship and SMEs). The Council should also proactively engage with higher education institutions (HEIs) (including Dundalk Institute of Technology as well as Maynooth University) and other business support agencies (e.g. Meath Partnership). There should also be engagement with the DECLG and national planning authorities in delivery of the identified sites.	Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
3. Constructive engagement between Meath County Council and businesses (including developers/landowners). Fundamental to this action is to ensure that officials continually think about how best the Council can serve businesses and wealth creators, who have the capacity to help deliver the identified sites and create jobs.	Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
<i>Key Economic Activities and their Potential by Employment</i>	
4. Promotion of the hierarchy of economic centres and targeted sectors in Meath with the objective of facilitating significant new enterprise employment in Meath (map shown earlier).	Responsibility with the CEO of Meath County Council and the Economic Development Team within the Council working in partnership with relevant senior personnel within IDA Ireland in regard to FDI. Commencement from adoption of the Economic Development Strategy by Meath County Council.

Source: This table is reproduced from Table 9.3 (p. 262 in the main body of the report).

Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – *Spatial Implementation Actions*

Action	Responsibility and Commencement
<i>Infrastructure and Services on the Identified Sites for Employment Generation</i>	
5. Meath County Council to undertake an assessment of the available infrastructure and services on all of the identified sites with employment potential, in conjunction with the relevant landowners, the goal being to complete the proposed site services matrix (Table 8.16, p. 220 of the main body of the report) and to plan for how best to address any deficiencies identified through framework plans.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>
<i>Delivery of the Identified Sites for Employment Generation</i>	
6. Meath County Council to consider the possibility of facilitating the development of a REDZ (Rural Economic Development Zone) within the County.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>
7. Meath County Council to consider the possibility of financial incentives designed to aid the delivery of the identified sites for employment generation.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>

Source: This table is reproduced from Table 9.4 (p. 263 in the main body of the report).

Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – *Marketing Actions to Promote Economic Development in Meath to Multiple Audiences*

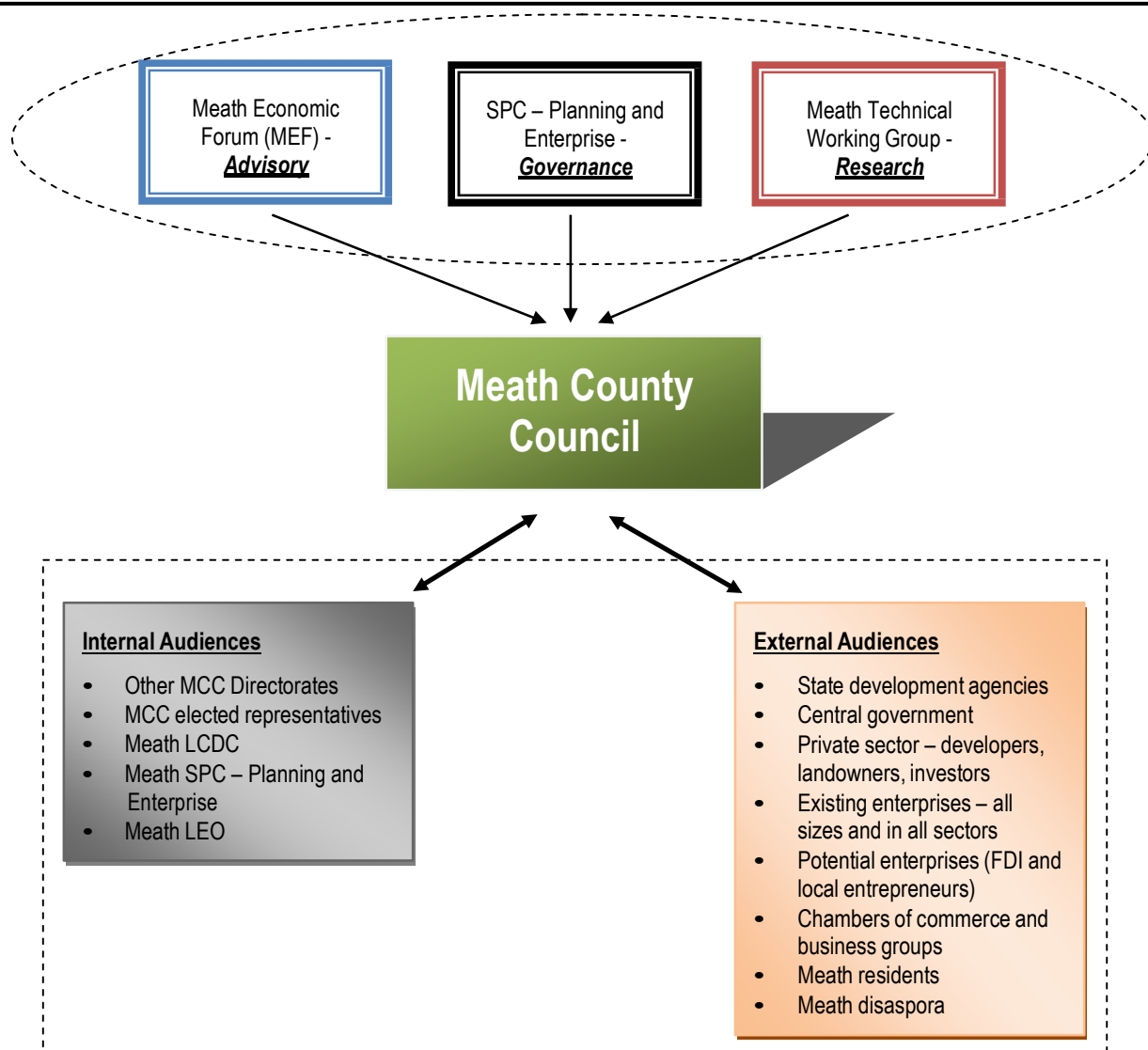
Action	Responsibility and Commencement
8. Building on recent initiatives to promote economic development in Meath, Meath County Council to lead on a series of complementary marketing initiatives aimed at building on and adding value to what has been achieved to date.	<p>Responsibility with the CEO of Meath County Council, the Director of Services (Economic Development) and the Economic Development Team at Meath County Council.</p> <p>Commencement of this action from adoption of the Economic Development Strategy Report by Meath County Council.</p>

Source: This table is reproduced from Table 9.5 (p. 263 in the main body of the report).

Implementation

The plan to effectively implement the Economic Development Strategy is illustrated schematically in the chart below. Meath County Council will play the leading role in implementation, with advisory inputs from the MEF and governance from the Meath SPC – Planning and Enterprise. The Meath Technical Working Group, which includes Meath LEO as well as senior representatives from the directorates of Meath County Council, will provide research support to the Economic Development Strategy. Shown in the lower part of the diagram are the internal and external audiences that the Council will need to interact with on an ongoing basis.

Implementation of the Economic Development Strategy for Meath 2014-2022



Source: This chart is reproduced from Figure 9.4 (p. 258 of the main body of the report).

Monitoring Progress on Implementation

The list of indicators that may be used to monitor performance regarding the implementation of the Economic Development Strategy is potentially vast. Priority therefore needs to be given to a small and manageable number of indicators for which independent data are available and we believe that the emphasis throughout needs to be put on employment.

The table overleaf sets out a list of key performance indicators (KPIs) to track during the process. These are grouped under five strategic priorities:

- FDI;
- Indigenous enterprise development;
- Entrepreneurship;
- Tourism; and
- The Meath labour market.

The table specifies the particular variables that can be evidenced in each case, indicating their sources and making the comment that it will be necessary to construct a time series per indicator (from at least 2011), which can then be presented to assess performance with implementing the Strategy (including at meetings of the MEF). It will be seen from the indicators proposed in the table below that we are also recommending a *comparative* element to the KPIs – namely to assess Meath’s performance *relative* to other locations in the country.

Every meeting of the MEF, from adoption of the Economic Development Strategy, should have an agenda item in which progress with implementing the Strategy is considered – this should also include progress regarding the delivery of the identified sites, infrastructure and services etc. The meetings of the MEF should continue to be business-like and focused on outputs and tracking progress, and seeking to understanding any impediments or bottlenecks arising and how they can be alleviated.

Following the next censuses in 2016 and 2021, 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 (or its next incarnation) 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, including educational attainment, the rate of outbound commuting and sectoral shifts in the composition of employment in the county towards more knowledge-intensive activities (with the proviso that the 2016 review would need to be sensitive to the fact that the Strategy would be only two years in implementation).

Performance Monitoring of the Economic Development Strategy for Meath 2014-2022

Strategic Priority	Key Performance Indicator (KPI)	KPI Periodicity	Comments
FDI	<ul style="list-style-type: none"> Permanent full-time employment in foreign-owned agency-assisted firms in Meath (and regionally and for State) Net jobs created or lost in foreign-owned agency-assisted firms in Meath (and in other counties) Number of IDA Ireland jobs announced in Meath (and regionally and for State) Number of IDA Ireland site visits in Meath (and other counties) Number of IDA Ireland inquiries re Meath 	<ul style="list-style-type: none"> Annual data available through special request from Forfás/DJEI/DJEI Monthly, quarterly and/or annual data through special request from IDA Ireland (Dáil Q&As) Plus other information obtained regarding Meath County Council interaction with IDA Ireland and Dáil data on net jobs and IDA site visits 	<ul style="list-style-type: none"> Requirement will be to develop time series to review trends since 2011 or earlier and assess performance relative to those years and from commencement of the Strategy (2015)
Indigenous Enterprise Development	<ul style="list-style-type: none"> Permanent full-time employment in Irish-owned agency-assisted firms in Meath Net jobs created or lost in Irish-owned agency-assisted firms in Meath Number of EI jobs announced in Meath (and regionally and for State) and other initiatives (funding etc.) 	<ul style="list-style-type: none"> Annual data available through special request from Forfás/DJEI Monthly, quarterly and/or annual data through special request from Enterprise Ireland Plus other information obtained regarding Meath County Council interaction with EI and Dáil data on net jobs (Dáil Q&As) 	<ul style="list-style-type: none"> Requirement will be to develop time series to review trends since 2011 or earlier and assess performance relative to those years and from commencement of the Strategy (2015)
Entrepreneurship	<ul style="list-style-type: none"> Number of participants in Meath LEO training programmes Number of participants in Meath LEO management development programmes Number of participants in Meath LEO seminars and networking events Number of participants in Meath LEO mentoring programmes Number of Meath LEO clients supported by financial initiatives Number of full-time jobs in Meath LEO client firms Number of Meath LEO client firms proceeding to EI programmes 	<ul style="list-style-type: none"> Annual or more disaggregated (time-wise) data from Meath LEO (monthly and/or quarterly, depending on availability) This will be dependent on records and data maintained within Meath County Enterprise Board The proposed annual surveys of businesses (Action 3) will also be relevant to enhancing business support in Meath 	<ul style="list-style-type: none"> Requirement will be to interact with Meath LEO with the aim of constructing time series on each of the KPIs (and other relevant KPIs for which data may be available) This process will also require incorporating historical data from Meath CEB to derive trends
Tourism	<ul style="list-style-type: none"> Number of visitors to Meath – domestic and NI Number of visitors to Meath – overseas and by segment etc. Corresponding spending by visitors Visitor attractions Serviced accommodation 	<ul style="list-style-type: none"> Annual or more disaggregated (time-wise) data from Fáilte Ireland (monthly and/or quarterly) Interact with FI Assembly of data from other sources 	<ul style="list-style-type: none"> Requirement will be to develop series to review trends since 2011 or earlier and assess performance
Meath Labour Market	<ul style="list-style-type: none"> POWSCAR indicators on those working and living in Meath, inbound and outbound commuters in 2016 and 2021 Live Register trends on claimants 	<ul style="list-style-type: none"> The years in which the next POWSCAR data will become available will be 2016 and 2021 	<ul style="list-style-type: none"> Mid-term and final reviews of the Strategy in 2017 and 2022 respectively Educational attainment etc.

Source: This table is reproduced from Table 9.2 (p. 260 of the main body of the report).

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 (which could possibly turn out to be even better than we have estimated in this report);
- Sectoral shifts and opportunities in knowledge-intensive activities;
- Delivery of the identified sites and their promotion – including the IDA Business and Technology Parks in Navan and Drogheda, the Pace site in Dunboyne, Ashbourne and Kells etc.;
- The cooperation and support of the key enterprise development agencies (the IDA, EI and Fáilte Ireland) will be important to the success of the Strategy and this will rest upon Meath County Council taking the lead in approaching and interacting with the agencies);
- The response of the private sector, including landowners, property developers and investors, to the development opportunities highlighted in this report will be a key determinant of the success of the Strategy (this will in part be dependent on Meath County Council fostering a constructive relationship with this group of stakeholders, ensuring sustainable development);
- 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).

Risks

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

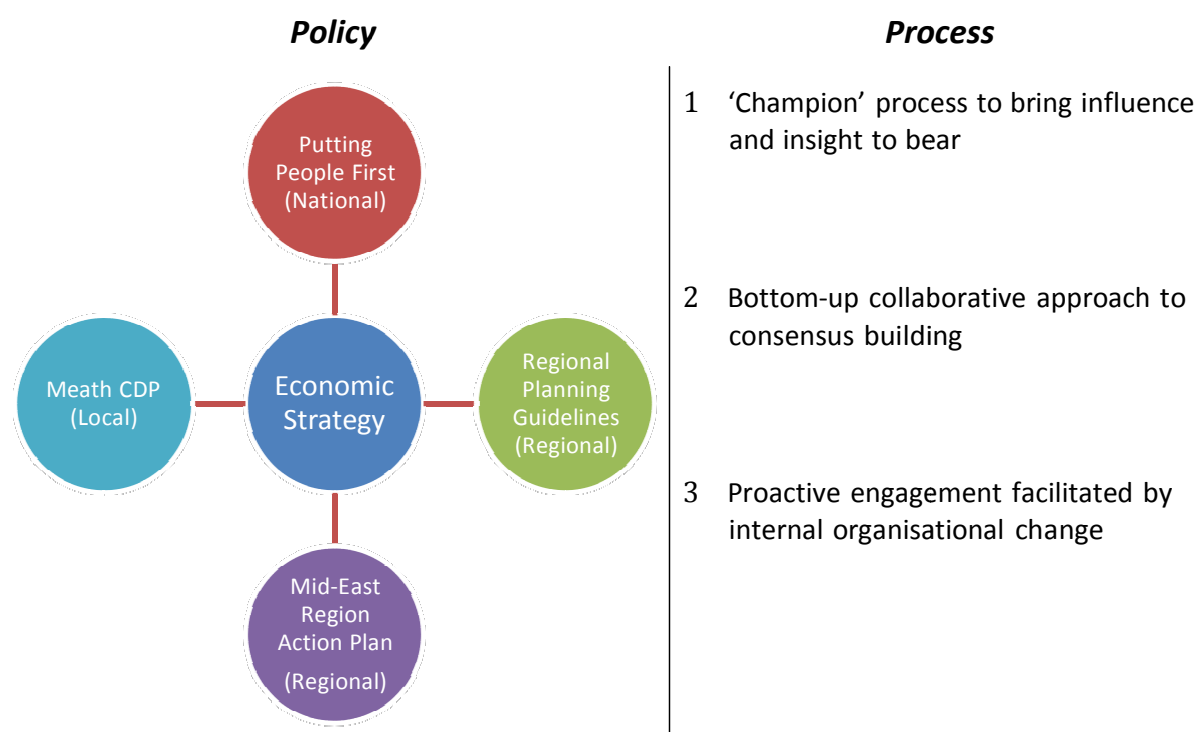
- *Macroeconomic* – the national economy performs less strongly than projected, which could arise from any or all of the following possibilities; (a) politically-driven decisions rather than economic in the run-up to the next General Election; (b) lagging European economic performance; (c) escalation of the geo-political tensions internationally, leading to higher input 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 here get caught up in 'red tape' through the variation process and/or personnel resisting change.

Concluding Remarks

The consultancy team commends this carefully prepared and evidence-based Economic Development Strategy for County Meath 2014-2022 to Meath County Council. The plan-led Strategy, if followed through in full, has the potential to deliver significant economic development and jobs for the county in the coming years, reflecting Meath's relative economic strengths and opportunities. The next phase in the process will be implementation and regular monitoring of the Strategy, to be appraised by Meath County Council and the Meath Economic Forum at the forthcoming meetings of the MEF.

The following schematic summarises the overall approach to constructing the Strategy in terms of the *policy* environment and the *process* involved in its implementation.

Figure 10.2: Schematic Illustration of Approach to the Economic Development Strategy for Meath



Source: Meath County Council, consultancy team review.

Glossary of Terms

ABP	An Bord Pleanála.
ABSEI	Annual Business Survey of Economic Impact.
AES	Annual Employment Survey.
AIRO	All-Island Research Observatory.
AIT	Athlone Institute of Technology.
ALMP	Active labour market programme.
APB	Advanced purpose building.
APJ	Action Plan for Jobs.
B&B	Bed-and-breakfast.
B2B	Business-to-business.
B2C	Business-to-customer.
BEPS	Base Erosion and Profit Shifting.
BERD	Business Expenditure on R&D.
BES	Business Expansion Scheme.
BIDS	Business Improvement District Scheme.
BIM	Bord Iascaigh Mhara.
BMW Region	Border Midland and Western Region (EU NUTS II region of Ireland).
BRIC	Brazil, Russia, India and China.
BTEA	Back to Education Allowance.
BTW	Back to Work.
BTWEA	Back to Work Enterprise Allowance.
CAGR	Compound annual growth rate.
CAO	Central Admissions Office.
CAP	Common Agricultural Policy.
CCMA	County and City Managers Association.
CDB	City/County Development Board.
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.
<i>Ceteris paribus</i>	Other things being equal.
CFCs	Chlorofluorocarbons.
CH₄	Methane.
CIT	Cork Institute of Technology.
CO₂	Carbon dioxide.
Cofl College	Church of Ireland College of Education.

Glossary of Terms

CPD	Continuing professional development.
CRO	Credit Review Office.
CSO	Central Statistics Office.
DAFF	Department of Agriculture, Food and Fisheries.
DCENR	Department of Communications, Energy and Natural Resources – Ireland.
DCU	Dublin City University.
DECLG	Department of Environment, Community and Local Government.
DIT	Dublin Institute of Technology.
DJEI	Department of Jobs, Enterprise and Innovation.
DkIT	Dundalk Institute of Technology.
DLIADT	Dún Laoghaire Institute of Art and Design.
DTO	Dublin Transportation Office.
ECB	European Central Bank.
Economic Development Strategy	Economic Development Strategy for County Meath during the period 2014-2022.
ED	Electoral Division.
EDP	Excessive deficit procedure.
EEC	European Economic Community.
EFSF	European Financial Stability Facility.
EFSM	European Financial Stabilisation Mechanism.
EGFSN	Expert Group on Future Skills Needs.
EI	Enterprise Ireland.
EMEA	Europe, Middle East and Africa.
EPO	European Patent Office.
ERC	Educational Research Centre.
ERDF	European Regional Development Fund.
ESM	European Stability Mechanism.
ESRI	Economic and Social Research Institute.
ETB	Education and Training Board.
EU	European Union.
Eurofound	European Foundation for the Improvement of Living and Working Conditions.
Eurostat	Official statistics agency of the European Union (EU).
FDA	Food and Drugs Administration.
FDI	Foreign direct investment.
FIBI	Federation of International Banks in Ireland.
FP7	Seventh Framework Programme (European Commission) (2007-2013) (predecessor of Horizon 2020).
FTI	FTI Consulting.
GB	Great Britain.

Glossary of Terms

GDA	Greater Dublin Area. GDP Gross domestic product.
GERD	Gross expenditure on R&D.
GHG	Greenhouse gas.
GMIT	Galway-Mayo Institute of Technology.
GNP	Gross national product.
GVA	Gross value added.
Ha	Hectare.
HEA	Higher Education Authority.
HEI	Higher education institution.
HGV	Heavy goods vehicle.
HHI	Herfindahl-Hirschman Index of concentration.
HLIC	High Level Implementation Committee (Food Harvest 2020).
HP	Haase and Pratschke (as in Pobal HP Deprivation Index).
HPSU	High potential start up.
HSE	Health Service Executive.
IBEC	Irish Business and Employers Confederation.
ICT	Information and communications technology.
IDA Ireland	Industrial Development Authority Ireland – responsible for foreign direct investment (FDI) into Ireland by foreign-owned firms.
IEA	International Energy Agency.
IERC	International Energy Research Centre.
IFA	Irish Farmers Association.
IFAC	Irish Fiscal Advisory Council.
IFPLUT	Integrated Framework Plan for Land Use and Transport Planning.
IFSC	International Financial Services Centre.
ILO	International Labour Organization.
IMD	Institute for Management Development (Lausanne, Switzerland).
IMERC	Irish Maritime and Energy Resource Cluster.
IMF	International Monetary Fund.
IoT	Institute of Technology.
IP	Intellectual property.
IPI	Irish Planning Institute.
ISIF	Ireland Strategic Investment Fund.
ISME	Irish Small and Medium Enterprises Association.
IT	Information technology.
ITB	Institute of Technology Blanchardstown.
ITC	Institute of Technology Carlow.
ITS	Institute of Technology Sligo.

Glossary of Terms

ITTRA	Institute of Technology Tralee.
Km	Kilometre.
Kmh	Kilometres per hour.
KPI	Key performance indicator.
LAG	Local Action Group.
LAP	Local Area Plan.
LCDC	Local Community Development Committee.
LDS	Local Development Strategy.
LECP	Local Economic and Community Plan.
LEED	Leadership in Energy and Environmental Design.
LEF	Louth Economic Forum.
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).
LIT	Limerick Institute of Technology.
LPT	Local Property Tax.
LYIT	Letterkenny Institute of Technology.
M&A	Mergers and acquisitions.
Mbps	Megabits per second.
MCA	Multi-criteria analysis.
MDEI	Mater Dei Institute of Education.
Meath LEO	Meath Local Enterprise Office.
MEF	Meath Economic Forum. NERA
	Mid-East Regional Authority.
MIC	Mary Immaculate College.
Mid-East Region	Comprising Counties Meath, Kildare and Wicklow.
MoU	Memorandum of Understanding.
Mph	Miles per hour.
MTES	Medium-Term Economic Strategy (2014-2020).
MTO	Medium-term objective.
MTR	Medium Term Review.
MTWG	Meath Technical Working Group.
N₂O	Nitrous oxide.
NAMA	National Asset Management Agency.
NCAD	National College of Art and Design.
NCC	National Competitiveness Council.
NCI	National College of Ireland.
NE Region	North-East Region.

Glossary of Terms

NEAP	National Employment Action Plan.
NEET	Not in education, employment or training.
NFQ	National Framework of Qualifications. NGN Next generation networks.
NI	Northern Ireland.
NPA	National Ploughing Association.
NPRF	National Pension Reserve Fund.
NRA	National Roads Authority.
NREAP	National Renewable Energy Action Plan.
NSS	National Spatial Strategy (2002-2020)
NTA	National Transport Authority.
NTA	National Transport Authority.
NTMA	National Treasury Management Agency.
NUI	National University of Ireland.
NUIG	National University of Ireland Galway.
NUIM	National University of Ireland Maynooth (rebranded Maynooth University during the course of the study).
NWCBG	North West Cross Border Group.
O₃	Ozone.
OECD	Organisation for Economic Co-operation and Development.
P/G	Postgraduate.
PaaS	Platform as a service.
PISA	Programme for International Student Assessment.
PL	Private label goods (own label brands among retail multiplies).
PLCs	Post-Leaving Certificate courses.
PMCA	PMCA Economic Consulting.
POWSCAR	Place of Work, School or College – Census of Anonymised Records (CSO).
PPS	Purchasing power standard.
PRI	Producer responsibility initiative (waste).
PRTL	Programme for Research in Third Level Institutions.
Putting People First	Putting People First – Action Plan for Effective Local Government (October 2012).
QNHS	Quarterly National Household Survey.
QUB	Queen’s University Belfast.
RAG/RAGs	Regional Aid Guidelines.
RCSI	Royal College of Surgeons of Ireland.
RD&I	Research, development and innovation.
RDP	Rural Development Programme.
RDP	Rural Development Programme.
REDZ	Rural economic development zone.

Glossary of Terms

RES	Renewable energy sources.
RES integration	Integration of renewable energy sources into the transmission system/grid.
RES-E	Ireland's renewable electricity generation target (by 2020).
RES-H	Ireland's renewable heating target (by 2020).
RES-T	Ireland's renewable transport target (by 2020).
RPA	Railway Procurement Agency.
RPGs	Regional Planning Guidelines.
RSS	Rural Social Scheme.
RTP	Rural Transport Programme.
SaaS	Software as a service.
SDZ	Strategic development zone.
SE Region	Southern and Eastern Region (EU NUTS 2 region of Ireland).
SEAI	Sustainable Energy Authority of Ireland.
SFA	Small Firms Association.
SFI	Science Foundation Ireland.
SGP	Stability and Growth Pact.
SGP	Stability and Growth Pact.
Shannon College	Shannon College of Hotel Management.
SLA	Service level agreement.
SME	Small and medium enterprise.
SPC	Strategic Policy Committee.
SPD	St. Patrick's College Drumcondra.
SPU	Stability Programme Update.
SSISI	Statistical and Social Inquiry Society of Ireland.
SSTI	Strategy for Science, Technology and Innovation.
St. Angela's	St. Angela's College Sligo.
STEM	Science, technology, engineering and mathematics.
SUR	Standardised unemployment rate.
SWOT	Strengths, weaknesses, opportunities and threats.
SYOB	Start Your Own Business.
TCD	Trinity College Dublin.
TEFL/EFL	Teaching English as a foreign language/English as a foreign language.
TFEU	Treaty on the Functioning of the European Union.
TI	Tallaght Institute of Technology.
TIVA	Trade in value added – OECD/WTO estimate of revealed comparative advantage in manufacturing industries (2009).
TY	Transition Year.
U/G	Undergraduate.
UCC	University College Cork.

Glossary of Terms

UCD	University College Dublin.
UL	University of Limerick.
UN	United Nations.
UNESCO	United Nations Educational, Scientific and Cultural Organization.
US	United States (of America).
USC	Universal Social Charge.
USGBC	US Green Building Council.
USP	Unique selling point.
UU	University of Ulster.
VAT	Value added tax.
WCY	World Competitiveness Yearbook.
WEF	World Economic Forum.
WEO	World Economic Outlook (IMF).
WIT	Waterford Institute of Technology.
WL	White Land
WTO	World Trade Organization.
yoy	Year-on-year.

Acknowledgements and Disclaimer

Acknowledgements

The consultancy team comprising FTI Consulting, PMCA Economic Consulting and John Spain and Associates would like to thank Meath County Council and the large number of stakeholders consulted for their help and support in preparing this report. The senior members of the consultancy team were: Dr. Pat McCloughan (Project Leader, Managing Director of PMCA Economic Consulting); Mr. Jim Devlin (Director, FTI Consulting); and Mr. John Spain (Managing Director, John Spain and Associates).

Disclaimer

This report is the responsibility of the consultancy team. By virtue of preparing the report or otherwise in connection with this study, the consultancy team will not assume any responsibility or have any liability to any third party.

1 Introduction

1.1 Purpose of the Report

This report is prepared for Meath County Council by a multidisciplinary consultancy team comprising FTI Consulting (FTI), PMCA Economic Consulting (PMCA) and John Spain and Associates (JSA). It formulates a plan-led Economic Development Strategy for County Meath for the period 2014-2022. The Economic Development Strategy comprises three interrelated strands – an Economic Action Plan, a Spatial Implementation Plan and a Marketing Plan – and the intention is that it will be incorporated into the current Meath County Development Plan (CDP) 2013-2019 by means of a variation.

1.2 Strategic Context of the Economic Development Strategy

The strategic context surrounding the Economic Development Strategy for Meath is manifested in a number of significant initiatives overseen by Meath County Council in the past year or so, including the:

- Appointment of a new Chief Executive Officer (CEO) of Meath County Council, who has taken on responsibility for economic development in the county in addition to her other leadership roles;
- Economic Development Team within Meath County Council, which includes a Director of Services and Senior Planner together with specialist support personnel;
- Formation of the Meath Economic Forum (MEF), which includes an independent chair, senior leaders from business and academia with Meath connections and officials from Meath County Council Directorates;
- Commissioning of the National University of Ireland Maynooth (NUIM) baseline economic profile of Meath;¹
- New high quality promotional material on Meath and its principal urban centres, which have been issued to the State agencies and attendees at events hosted by Meath County Council;
- Commissioning of this Economic Development Strategy study.

1.3 Terms of Reference for the Study

Nature and Scope of Services

The service required was to prepare a plan-led Economic Development Strategy comprising 3 strands:

- An Economic Action Plan;
- A Spatial Implementation Plan;
- A Marketing Plan.

It was specified that clear, concise, innovative and action-focussed recommendations/actions should be provided to accelerate the economic transformation, revitalisation and medium/long-term sustainable development of County Meath. The recommended measures should be directed at enabling Meath to prosper as a successful, diverse and vibrant social, civic, commercial, and residential centre that will be recognised locally, nationally and internationally as a highly attractive and distinctive location in which to conduct business.

¹ In the latter stages of finalising this report, NUIM became 'Maynooth University' in a re-branding of the university.

It was also specified in the terms of reference that the Economic Action Plan, Spatial Implementation Plan and Marketing Plan be linked and aligned to culminate in a clearly defined 'Vision for Meath'. Clear themes and key outputs from the process were required to be identified, and recommendations for guiding principles provided on the setting up of an Implementation and Monitoring Group, including funding and stakeholder collaboration.

Economic Action Plan

The terms of reference required that the Economic Action Plan should:

- Identify specific proposals/set of strategic economic activities to drive the revitalisation of the economy of County Meath;
- Identify key potential industries and service areas;
- Assess both private and public investment priorities (and their role);
- Analyse 'best fit' planning and enterprise policy development;
- Identify specific sectors of enterprise, business sectors and export policies;
- Ensure that Meath leverages effectively from national and international initiatives;
- Consider development scenarios and options for the delivery of the proposed North East (NE) Regional Hospital;
- Compile recommendations to develop and embed the role of third-level institutions and commercial research facilities in County Meath;
- Examine ways of maximising the potential for development of activities in export-oriented sectors and other key sectors identified as having significant growth potential in international markets;
- Compile recommendations to accelerate the development and synergistic clustering of engineering, design and manufacturing companies in the small and medium enterprise (SME) and 'start up' sectors particularly in the hinterland area of County Meath;
- Identify other significant uses or activities (for example, educational/research, civic, etc) which have the potential to underpin/complement the economic development of County Meath;
- Outline the role of stakeholders in addition to future collaborative structures (for example, partnership approaches);
- Advise on ancillary activities that are important to sustain employment and economic prosperity throughout County Meath, including small enterprises, business start ups, etc; and
- Advise on the cost implications of proposals.

Spatial Implementation Plan

The terms of reference required that the Spatial Implementation Plan should examine:

- Integration of investment opportunities with land-use planning proposals;
- Development of 'strategic sites' in a range of locations suitable for appropriate sectors (for example, Industrial Development Authority (IDA) Ireland-supported office-based employment centres);
- Take account of widening gaps between different parts of the county;
- Examine the likely locational requirements for all business sectors;
- Assess the potential competition from neighbouring local authorities.

Marketing Plan

The terms of reference required that the Marketing Plan should:

- Set out a marketing strategy based on the Economic Vision for Meath;
- Specify target audiences and objectives;
- Provide advice on how best to attract new investments for existing commercial centres and new development proposals;
- Give advice on how best to avail of the new facilities and offerings in the development/redevelopment of key strategic sites and locations;
- Focus on new industries, which Meath wishes to attract and set out actions/initiatives to attract and embed same (due attention should be directed to 'start up' businesses);
- Promote Meath as part of the National Gateway (i.e. the Greater Dublin Area or GDA);
- Suggest suitable additional publicity material for the promotion of key strategic sites and locations.

Spatial and Economic Assumptions

The terms of reference also required that the report should consider different scenarios and possibilities in relation to (i) the trajectory of economic growth and (ii) spatial strategy and planning.

In particular, it was required that the report should be presented in recognition of two potential scenarios in relation to regional policy:

- Change in the existing regional regulatory policy (e.g. the possibility of increasing Meath's footprint in the Dublin Metropolitan Area); and
- Policy 'status quo'.

The terms of reference also specified that the report should consider three economic scenarios:

- *Likely* – where national growth rates are in line with current national projections;
- *Pessimistic* – where national growth rates are significantly less than current national projections;
- *Optimistic* – where national growth rates exceed current national projections.

It was required that national growth assumptions should be explicit in the Economic Development Strategy. The impact of these assumptions on the actions contained in the Economic Development Strategy and the likely outcomes of those actions (both positive and negative) should be clearly outlined. The Economic Development Strategy should take care to consider what drivers have mediated and are likely to mediate between national trends and the economic and spatial development of County Meath, and should focus on bringing about change in these drivers. Equally, the relevant external variables (both policy and macroeconomic), which are outside of the control of Meath County Council, should be listed, and reference made to what actions might be taken, in implementing the Economic Action Plan, to take account of these.

It was required that the Economic Development Strategy be sufficiently resilient and robust to deal with different 'scenarios', both in terms of regional regulatory policy and variations in the macro national economic climate.

1.4 Methodology

Overview of Approach

The consultancy team's methodological approach to fulfilling the terms of reference has comprised relevant, rigorous and robust quantitative and qualitative review and analyses of a wide range of factors and trends impacting on the local economy of Meath, including the overall goal of the Meath CDP 2013-2019 (as varied) of a "county that fosters sustainability throughout its vibrant communities, dynamic economy and unique cultural and natural heritage".

At the beginning of the study, by agreement with Meath County Council, the consultancy team met with the MEF and the Meath Strategic Policy Committee (Planning and Enterprise) on 15 April 2014 and 23 April 2014 respectively. The purpose of the former meeting was to commence engagement with the MEF, which was formed by Meath County Council in 2013 to assist with the economic development of the county. Chaired by former Taoiseach and former Irish Ambassador to the US, Mr. John Bruton, the MEF's members include senior personnel from business and academia, and the policy environment, providing high-level advice with the aim of promoting Meath as an investment location and place to do business and visit. The MEF is supported by the Economic Development Team of Meath County Council.

The meeting with the MEF included a presentation by the consultancy team on the scope of, and proposed methodology for, the study and the members of the MEF helpfully provided feedback to the team on key areas, opportunities and issues, which we have taken on board during our work. A similar process was followed in respect of the helpful meeting with the aforementioned SPC.

At the end of the process, when finalising the report, presentations of the key findings and proposed actions were presented by the consultancy team at two further meetings with the SPC and MEF.

Specific contributions from personnel at Meath County Council – relating to economic planning and spatial planning – are also reflected in our analysis and the report is all the better from these inputs.

Key Comparative Economic Advantages of Meath

At a high-level, the comparative economic advantages possessed by Meath include (but are not necessarily limited to): its favourable location close to the capital, strong transport infrastructure and large population. However, what appear to be less recognised from an economic development perspective are the demographic structure of the population, including the number of people aged between 20 and 44 years, and the commuters. Also pertinent in the context of this report are the facts that Meath is a fundamentally prosperous county – it is one of only a very few (less than a handful of) locations in the country in which primary income exceeds disposable income – and has exhibited appreciably strong employment growth in indigenous enterprises in the past few years, as Ireland has commenced its climb from the most severe recession in its history. All the comparative economic advantages considered in this report have strategic or marketing value and should be harnessed accordingly.

Key Issues Affecting Economic Development in Meath

Turning to issues or relative weaknesses, we consider that there are four possibilities (the significance of each is discussed presently): one, the observation made by a number of stakeholders with whom we consulted that Meath is a large, diverse county in a complex setting; secondly, the need to ensure 'scaling' or growth of indigenous enterprises; third, that educational attainment is relatively low in Meath; and fourthly, that Meath has failed to attract significant amounts of FDI over the years.

Importance of FDI

Of the four possible issues, FDI is the most important and pressing concern from an ‘action’ or ‘to-do’ perspective for Meath. The role and importance of FDI hardly needs to be motivated here but it is nevertheless worth observing that it provides to a large extent the basis of Ireland’s economic performance – including exports, skills and innovation – and exerts a significant impact on the rest of the economy in the form of pay and local purchases of goods and services. Further, contrary to what is sometimes erroneously perceived or stated in the media, the subsidiaries of foreign-owned companies in host locations tend to exhibit significantly greater longevity compared with other firms – a finding that accords with *a priori* expectations given that multinationals are generally special firms that have acquired or developed unique competitive advantages for which there is international demand and/or cross-national production capability. It goes without saying that FDI firms are important to local authorities as well as local communities in host countries like Ireland owing their source of rates for local financing and services – the relatively low quantum of FDI in Meath over the years is reflected in the county’s relatively low/narrow rates base, in contrast to other, smaller and less populous counties that have taken a more proactive (and some stakeholders would say “bolder and more ambitious”) approach to attracting inward investment. The significance of these observations for Meath rests in part on the fact that Ireland is currently performing strongly in attracting more FDI jobs – the big challenge, or rather opportunity, for Meath is to take a bigger share of the growing number of FDI investments.

Our overall assessment as to why Meath has not performed strongly in FDI over the years comes down basically to three factors, reflecting both planning and economic development issues:

- The ‘Meath story’ is not compelling enough and/or is not being communicated properly;
- The county has not plugged into IDA Ireland sufficiently proactively – even though both have the same incentive to attract more FDI into the county (sustainably); and
- There is insufficient FDI infrastructure in the form of serviced sites and, of growing importance, advanced purpose buildings (APBs) to attract the attention of potential investors, and the IDA.

The positive news is that Meath can surmount these problems and a key part of the Economic Development Strategy is designed in this regard. Thus, the more compelling story must include the significant region in which Meath is located and the county’s seamless connectivity with Dublin and its attractions. Meath must promote itself as a cost-competitive location within this key region of the country. The assumption that the IDA will be a-tune to this needs to be dispelled and the onus will be on the county to continuously engage with the IDA to ensure that its FDI offering is communicated to the wider world. In regard to the last issue, a more flexible and joined-up approach needs to be adopted by Meath County Council in respect of ensuring an adequate supply of serviced sites and APBs to attract the interests of IDA Ireland and prospective inward investors.

Educational Attainment

Educational attainment is another important issue. According to the latest census results, it turns out that the degree of higher educational attainment is lower in Meath compared with the rest of the country and this finding is robust to measurement (e.g. whether we are looking at educational attainment relative to the whole population of the county, or relative to those aged over 15 years or on the basis of those at work, the proportion with third-level qualifications is comparably low in Meath). When we shared this finding with Meath County Council and stakeholders consulted, there was some surprise and at the same time keenness to understand the reasons for the finding, which we put down to the traditional mix of economic activity in the county – facilitate more knowledge-oriented activities in the county and we should expect educational attainment to improve accordingly.

Meath's Commuters and Their Role in Enhancing FDI and Educational Attainment in the Coming Years

The commuters are a particularly strong resource for Meath with significant potential to drive more FDI into the county, in our view. One of the salient findings from our empirical analysis is that, proportionately speaking, Meath is the largest commuter county or local authority area outside of Dublin. In particular, in 2011, the latest year for which detailed data are available on commuters and their characteristics, 54% of all residents of Meath at work in any location did so outside of the county (mainly in Dublin). In that year (for which detailed census data are available), there were almost 33,000 outbound commuters living in Meath, higher than the number of people living and working in the county (approximately 28,500) and the number of inbound commuters (c. 10,500).

The outbound commuters from Meath have the highest levels of educational attainment among those residing in the county, followed by the inbound commuters (i.e. those working in Meath but residing outside of the county) and then those who both work and live in the county. In fact, our analysis reveals that, of the three groups of workers relating to Meath, only the outbound commuters' educational attainment exceeds that of the country as a whole – in 2011, over 41% of the outbound commuters at work (outside of the county) had third-level or higher educational qualifications, compared with 38% of those in the country at work (the corresponding proportions for the inbound commuters and those both living and working in Meath were 37% and 25% respectively, lower than the aforementioned State figure of 38% in that year).

When account is also taken of the skills and work experiences of the outbound commuters – for example, there were more employers and managers, and more higher professionals, residing in Meath but working outside of the county in 2011 than living and/or working in the county – it is seen that the outbound commuters represent a significant resource with promotional potential in respect of seeking to attract more inward investment into Meath.

Owing to the relatively strong educational attainment of the outbound commuters who have come to live in County Meath in the past decade and more ago – from various other parts of the country, the island of Ireland and overseas – it is reasonable to expect that their children, who are likely to be mainly Meath-born residents at this stage, will themselves proceed to third-level/higher education in the coming years, thereby raising the overall level of educational attainment in the county.

With this dynamic in mind – namely the likelihood of the children of the outbound commuters who have settled in Meath proceeding to third-level during 2014-2022, and a greater proportion of the general population of the county doing so as well in response to the implementation of the Economic Development Strategy, we are therefore less concerned about Meath's currently relatively low educational attainment than we are about the county's performance in respect of FDI, which we consider needs to be enhanced as a matter of priority.

Other Possible Issues for the County

Two other possible issues for the county are the need to support the growth of indigenous enterprises and the view expressed in our consultations with stakeholders that Meath is a large and diverse county (in a complex setting, often seen to be in the shadow of the GDA).

The former issue is important and it should be clarified that indigenous enterprise employment is every bit as important as FDI employment in Meath or any other part of Ireland. Indigenous industry employment is strong in Meath (compared with the country as a whole), while FDI employment or the density of such employment is relatively low in Meath and requires to be addressed.

However, this does not necessarily mean that we should take the growth observed in indigenous employment in Meath for granted or assume that it will continue in the future, without appropriate business supports continuing to be provided – the supports that have gone into assisting the growth and development of indigenous enterprises in Meath need to be continually reinforced during the period of the Economic Development Strategy, reflecting the competitiveness of the markets in which the firms concerned operate. The supports provided by Meath Local Enterprise Office (Meath LEO) and Enterprise Ireland (EI) need to become even more effective during the Economic Development Strategy period.

Turning to the observation that Meath is a large and diverse county, in a complex setting, the conceptual map below (which should not be interpreted as a planning map) attempts to capture stakeholder views on the matter, where it is sometimes seen that the county consists of about three sub-counties with different make-ups and capabilities ('East Meath', 'Central/South Meath' and 'North/West Meath'). While the different parts of the county have subtly different complexions from an economic viewpoint, when considered more closely it is seen that they may have more in common than sometimes thought. For example, the Boyne Valley is common across the whole county, as is the strong pride in the overall identity associated with 'Meath' and, in promoting the county for FDI, tourism and other economic-related purposes, the regional context cannot be overestimated (i.e. 'County Meath as a key part of the most competitive, dynamic and innovative region of Ireland' etc.).

Figure 1.1: Conceptual Map of County Meath



Source: Consultancy team documentary review and stakeholder consultations.

Work Elements of Our Approach to the Study

Our approach to the study has been based on the following work elements:

- 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, including what economic variables can or cannot be influenced by Meath County Council;
- 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 the following bodies;
 - Central Statistics Office (CSO)
 - Forfás, which compiles data from the enterprise development agencies that include IDA Ireland and Enterprise Ireland
 - Meath County Council
 - Meath LEO
 - Government departments, including the Department of Jobs, Enterprise and Innovation and the Department of Environment, Community and Local Government (with which we also consulted)
 - Other organisations
- Quantitative and qualitative analyses of a large range of information and data garnered from an extensive consultation programme (with follow-up) with various stakeholders in the economic development of Meath, which included the following (alphabetical order):
 - Meath County Council
 - Meath LEO
 - Meath County Council tourism development and personnel
 - Meath SPC – Planning and Enterprise
 - Meath Technical Working Group
 - Meath Economic Forum
 - Meath County Development Board
 - Meath-Louth Tourism
 - Mid-East Regional Authority (MERA)
 - IDA Ireland
 - Enterprise Ireland
 - Dunboyne College of Further Education
 - Dundalk Institute of Technology (DkIT)
 - Maynooth University (NUIM)
 - Other proximate third-level institutions, including Dublin City University (DCU), Athlone Institute of Technology (AIT), University College Dublin (UCD), Trinity College Dublin (TCD), IT Blanchardstown (ITB) and Dublin Institute of Technology (DIT)
 - Fáilte Ireland
 - Meath Partnership/Leader
 - Teagasc
 - Sustainable Energy Authority of Ireland (SEAI)
 - Irish Farmers Association
 - Chamber of commerce in Meath (including those in Navan, Kells and Ashbourne) and

- Members of the MEF.
- Projections of the level of employment in County Meath to 2022 (going into the Economic Vision for Meath), 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 current Meath CDP 2013-2019 (as varied);
- Marketing plan for Meath, which integrates the economic and spatial plans;
- Overall set of actions for implementing the Economic Development Strategy and monitoring progress during 2014-2022, plus cost estimates in relation to the actions.

At the beginning of the study, Meath County Council provided the consultancy team with an economic baseline study of Meath prepared by researchers at the Department of Geography and the All-Island Research Observatory (AIRO) at Maynooth University. This helpful study informed our analysis of the existing employment situation in Meath and our work included liaison with the researchers at the university to clarify on some points and to engage in some additional data analysis of the CSO's POWSCAR (Place of Work, School or College – Census of Anonymised Records) data, which has been used to inform our analysis of the commuters (to and from Meath in 2011).

1.5 Structure of the Report

The rest of the report is structured as follows:

- Sections 2, 3 and 4 outline the national, regional and local policy contexts of the Economic Development Strategy respectively before Section 5 considers the European policy context and relevant economic developments, and then Section 6 draws the background/contextual pieces together in a short one-page summary;
- Section 7 provides a focused evidence-based economic profile of County Meath, drawing on a range of information sources to distil key facts and trends on the county's *relative* economic performance;
- We then set out the Economic Vision for Meath 2022 in Section 8, which includes different economic scenarios for employment growth in the county and projections of the composition of employment by sector in that year;
- Based on the preceding section, Section 9 then presents the Economic Actions, Spatial Actions and Marketing Actions and provides recommendations on implementing and monitoring the Economic Development Strategy; and finally
- Section 10 concludes the report.

2 National Policy Context

2.1 Introduction

This section outlines the national policy context surrounding the Economic Development Strategy for Meath, beginning with the local authority reform process underway across the country and including extensive discussion of the key issue of FDI.

2.2 Local Authority Reform

Putting People First – Action Plan for Effective Local Government (2012)² and the Local Government Reform Act 2014³ together plan and provide for the new structures and arrangements in respect of the significant local authority reform process underway in Ireland. Both are considered presently.

2.3 Putting People First

Greater Economic Development Role for Local Authorities

Putting People First plans for significant change in local governance in Ireland, including re-structured local authorities that will be expected to perform their existing functions more efficiently and in a more transparent and accountable manner. Local authorities will also be required to take a more proactive approach to facilitating enterprise and economic development, thereby contributing to the principal national policy objective of creating and sustaining jobs. The initiative can be seen as part of the wider reform process of the public service, under the aegis of the Department of Public Expenditure and Reform.

Recognising the interplay between the traditional functions of local authorities and economic development, Putting People First observes that (p. 22):

“local authorities are important enablers of economic development and many of their mainstream or traditional functions, particularly planning, environment and infrastructure, are critical to enterprise and economic activity...local authorities engage closely with businesses and with relevant agencies, providing an effective point of contact for existing and prospective businesses to engage with local government on relevant matters in setting up and managing their businesses and to ensure speedy and coordinated access and response”.

Generally speaking, while local government do employ people, their principal overall role in economic development is to facilitate the creation of an environment conducive to enterprise development and job creation and sustenance – working with, rather than against, businesses and wealth creators.

Economically speaking, effective planning equates with *maximising positive externalities* (e.g. informing businesses about supports, networks and events, and enabling clusters to take effect etc.) and *minimising negative externalities* (e.g. inappropriate planning not reflecting needs and evidence).

² Putting People First is available at <http://www.environ.ie/en/PublicationsDocuments/FileDownload,31309,en.pdf>.

³ The new legislation is available at <http://www.environ.ie/en/Legislation/LocalGovernment/LocalGovernmentAdministration/FileDownload,35715,en.pdf>.

The spirit and intention of Putting People First in regard to the greater economic development remit of local authorities is a generally positive and welcome development, and is being embraced by local authorities, including Meath County Council (although it is fair to say that the extent of the reform process also presents a major challenge for local authorities in managing the changes and adjusting to the new expectations placed upon them).

The principles behind the initiative go back a number of years. For example, at the Irish Planning Institute (IPI) Conference 2009, the then President remarked as follows:

“We need a system that stops bad development but places fewer impediments in the way of good [sustainable] development ... Our planning system needs to deliver an environment that includes the basis for a more competitive and sustainable economy ... the likely outcome of a planning application is not clear enough at the outset ... the key is to make better planning decisions that allow people the opportunity to live closer to where they work ... we can make significant reductions in the cost of employing workers in this [c]ountry if we plan and invest to reduce the cost of travelling to work”.

Few would argue against the common sense approach implicit in these excerpts, all of which are relevant in the context of this report.

The terms ‘sustainable development’ and ‘competitiveness’ are inextricably linked. In economic terms, sustainable development broadly equates with the concept of non-inflationary growth or growth that can be achieved over a number of years without putting significant pressure on costs and prices, in turn facilitating investment and innovation, which are the hallmarks of competitiveness. The development of new products and services is also a central characteristic of competitiveness, leading to higher living standards and a better quality of life.

Enhancing Local Enterprise Support through Local Enterprise Offices (LEOs)

The enterprise development function of local authorities under Putting People First includes supporting local micro and small enterprises through local enterprise offices (LEOs), which will take over the functions of the (former) county/city enterprise boards (CEBs) and local authority business support units. By supporting very small and small businesses,⁴ it is envisaged that local authorities will form a more coherent link in the enterprise value chain, thereby facilitating the evolution of enterprises as they ‘graduate’ to take on higher-order functions, like exporting and engaging in research, development and innovation (RD&I). As they graduate and grow in these ways, enterprises create employment and/or spend more in their local economies, thereby contributing to sustainable economic development. A fundamental requirement of the LEOs and the State enterprise development agencies working in tandem with the LEOs, including EI, will be to ensure that enterprises are signposted towards the most relevant and appropriate business supports available given their needs.

Under the new local authority arrangements, LEOs will be expected to bring together the experience, intelligence and knowledge of the former CEBs and business support teams within local authorities to provide a one-stop-shop for all business enquiries and act as the connection point between local businesses and the State enterprise development agencies with a remit in Meath (EI, IDA Ireland and Údarás na Gaeltachta) (the Meath Gaeltacht is located near Navan with approximately 1,800 persons).

⁴ A micro enterprise, as generally defined, employs less than 10 persons and a small enterprise employs between 10 and 49 persons. Medium enterprises employ 50-249 persons and large enterprises 250 or more persons.

The mission of the LEOs 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.

Any person with a business idea or anyone with an established business seeking information, advice, referral to other supports, training, mentoring or looking for financial assistance comes under the remit of LEOs (thus, for example, people currently unemployed and contemplating starting a business of their will be eligible for assistance).

New protocols have been delivered with other State agencies and departments, including the Revenue Commissioners, the Department of Social Protection, the Education and Training Boards (ETBs), Skillnets, Microfinance Ireland and the Credit Review Office (CRO) to ensure that beneficiaries are informed about and directed to all relevant government supports. There is a plethora of publicly-funded and other supports for enterprises in Ireland currently, and the many and varied list of interventions can sometimes come across as a 'maze' and be daunting for entrepreneurs; the LEOs have been designed to streamline the process and address the informational market failures in the provision of supports to businesses by making entrepreneurs more informed regarding what is available and what may work best for their needs.

It is planned that the LEOs will work in practice through a service level agreement (SLA) with EI. In this way, the LEO will act to combine the expertise of EI in supporting indigenous businesses with the broad reach and services of local authorities.

Meath LEO and other LEOs around the country came into effect on 15 April 2014. In the context of this report, and the requirement to enhance enterprise and economic development in Meath, it is relevant to consider how the LEOs will be different to the former arrangements and, in particular, how LEOs, like Meath LEO, can make a real difference (as national policy expects). In our consultation with the Department of Jobs, Enterprise and Innovation, the phrases "more proactive" and "joined-up business support designed to avoid any silo mentality" between agencies were mentioned to us in respect of the LEOs. The DJEI expects that LEOs will operate an "open-door" approach to hearing from prospective and actual businesses, and "not to just to wait for enquiries before responding". The LEOs need to do even more than before (under the CEBs) and this will include acting like businesses themselves by seeking out enquiries and clients in a proactive manner – part of the function of the Project Evaluation and Approval Committees overseeing the running of the LEOs will be to consider various performance metrics relevant to the work of the LEOs, including the number and nature of enquiries coming into the LEOs. Capturing such information will be valuable to local authorities in fulfilling their enhanced economic development role under Putting People First and the greater intelligence attained as a result of the more proactive approach under the new LEO system will help to ensure the scaling and growing of entrepreneurs, and jobs, which are the end-goals of the initiative. In helping to grow the client base of the LEOs, it is expected that they will engage positively with chambers of commerce, local business groups and other community and voluntary organisations, which are also active in initiatives designed to help the unemployed, part of whom may be seen by all concerned as potential entrepreneurs.

Meath Partnership and LEADER

Another relevant and important part of the business support environment in County Meath is Meath Partnership and EU LEADER.⁵ LEADER is funded under the EU Rural Development Programme (RDP) and was established by the European Commission in 1991 to promote the development of sustainable rural communities throughout the EU.

The latest RDP (LEADER) 2014-2020 is currently underway and in Meath is supported by Meath Partnership, which was established in 2006 to deliver a range of rural, social and economic programmes at local level across the county. Through LEADER, Meath Partnership aims to provide support and assistance to private individuals and community groups active at local level through capital grant aid, technical assistance, guidance and mentoring, information and support, training opportunities and development initiatives. Meath partnership works principally with micro businesses and the sectors to which it provides support include artisan food enterprises and rural tourism initiatives.

Meath Partnership has also worked in tandem with the former Meath CEB, where the organisations have cooperated regarding enquiries by people and businesses asking about or seeking business support. It is envisaged that this cooperation will continue between Meath Partnership and Meath LEO as part of ensuring enhanced business support. Another noteworthy feature of both organisations is their training provision to existing employers and employees as well as to prospective business owners. The use of contracted trainers means that scale tends not to be a significant issue in the provision of training (in the case of Meath Partnership, financial support comes from the EU). However, it is important that all training provision by the organisation is demand/market-led rather than being too supplier-led, which tends to be a feature of business support generally. Demand-led business support is business support designed to respond to identified business or market needs, which in turn requires business support organisations like Meath Partnership and Meath LEO to be actively engaging with their clients about their needs and addressing wider business issues (through surveys and other data collection means to inform baseline situations of what is needed etc.).

As part of its commitment to enhance enterprise performance and economic development in Meath, Meath County Council commissioned a survey of local businesses in the county last year and the results of the survey were presented at the September 2013 meeting of the MEF. The key results of this survey are considered further in Sub-Section 7.6 on enterprise performance but the point being made here is that this kind of information can be invaluable to facilitating sustainable development and subsequently in the report we will be recommending that more surveys of this kind are carried out in the coming years, during the implementation of the Economic Development Strategy for Meath – they inform about local business needs, what business supports work and what do not work, and therefore help to prioritise local authority economic planning.

Another area where Meath Partnership may usefully work in partnership with Meath LEO/Meath County Council is in identifying and/or acting upon EU funding opportunities that become available from time to time – through the regional offices in Brussels where Irish officials are in touch with local authorities regarding funding opportunities and are available to assist with queries and applications.

Box 2.1 summarises the salient features of Ireland's proposed new approach to LEADER, the decision regarding which is expected to be made by the European Commission later this year with envisaged commencement in early 2015.

⁵ LEADER is a French acronym, standing for Liaison Entre Actions de Développement de l'Économie Rurale, meaning 'links between the rural economy and development actions'.

Box 2.1: New Approach to LEADER in Ireland

Ireland submitted its 2014-2020 national RDP, which includes provision for the future of the LEADER approach, to the European Commission for approval on 3 July 2014. Significantly, the operation of the LEADER Programme is to be part of the move to a more integrated approach to the delivery of local development interventions, keeping the participation of community interests central to the approach, but working within some of the new structures established under the Putting People First local government reform process.

Some of the more significant changes in relation to LEADER will see: (a) a re-definition of the areas within which the programme will be delivered; (b) a new partnership approach, bringing local public and private interests together; (c) a hierarchical framework of strategic policy priorities at local, regional, national and EU levels; (d) a new two-stage process for selecting local action groups (LAGs) to deliver the programme; and (e) a set of indicative themes to help develop local development strategies (LDS) for programme implementation.

The definition of the rural areas for the purposes of local development through LEADER is to be slightly different than that used for other measures of the RDP. LDS will be developed for 'county based sub-regional areas', which excludes Dublin City and suburbs and the cities of Cork, Limerick, Galway and Waterford, but also the 'census towns' – those of over 15,000 population – meaning that smaller urban centres are to be included. Accordingly, the RDP designates 28 areas, where a LAG will operate, as follows: one for each county (24 in total), except in the cases of Dublin, where a single LAG will cover the rural parts of Dún Laoghaire-Rathdown, South Dublin and Fingal, and of Cork, which will have 3 LAGs.

As a follow on from the recent local government reforms, it is envisaged that community representatives and local development agencies will work in partnership with the relevant local authority to design and implement the LEADER LDS. This will be required to be consistent with the new LECs (local economic and community plans), which are to be developed by LCDCs (local community development committees) within each local authority and which will in turn be influenced by both county development plans and the appropriate regional spatial and economic strategy (for which the new regional assemblies will have responsibility – these are outlined in the main text below). The rationale is to ensure close alignment of local development actions with broader economic, social and physical planning processes at local level.

The RDP also sets out LEADER Themes which will help guide the elaboration of the local strategies, strongly reflecting the recommendations of the Commission on the Economic Development of Rural Areas or CEDRA. These include: (1) supporting economic development and job creation in rural areas, including through tourism; enterprise development (notably food producers, renewable energies, marine, social enterprise, and creative industries); broadband; and the integrated development of rural towns and their hinterlands; (2) social inclusion through building community capacity, training and animation; and (3) rural environment, including the protection and sustainable use of water resources, the protection and improvement of local biodiversity and the development of renewable energy. While the RDP underlines that the 'bottom-up' nature of LEADER means that local strategies must reflect local need, there will also be a requirement to reflect the three EU cross-cutting issues of innovation, climate change and environment.

Subject to approval of the Rural Development Programme by the Commission over the coming months, it is envisaged that the processes for selection of LAGs and for the elaboration of LDSs should take place during the remainder of 2014 and that operation of successful LDS will commence in early 2015.

Source: Irish Regions Brussels Office (June-July 2014 Bulletin), consultancy team review.

Synthesis of How Local Authorities can Facilitate Economic Development under Putting People First

Box 2.2 below provides a synthesis by the consultancy team of how local authorities will be expected to, and can, facilitate enterprise and economic development under Putting People First. As well as their traditional functions in planning and infrastructure development, local authorities will also be expected to play a more proactive and business-like role in the following key support areas:

- *Marketing and promotion* – including promoting at county level to drive greater interest, inward investment and footfall to complement businesses' more specific marketing campaigns and promotions by business groups like chambers of commerce (the marketing and promotion by local authorities should be distinct from and complement other, privately-led marketing and promotion);
- *Business support* – including thinking 'enterprise', 'competitiveness' and 'better regulation' in the day-to-day activities of businesses (e.g. local authorities need to be more acutely aware of how their day-to-day actions and regulations affect local entrepreneurs and businesses and this includes tendering competitions etc.);⁶
- *Gathering and maintaining local business intelligence* – every informal inquiry, if appropriately logged by the LEO/local authority, has value in helping to improve the provision of business support and the overall economic environment (e.g. because taken together enquiries from businesses serve to inform on needs or the rationale for certain types of support or intervention, which may require additional funding from the public purse subsequently);⁷
- *Other* – ensuring a 'problem-solving' approach to dealing with businesses and advocating in the interests of business clients to central government.⁸

It is also seen in the box overleaf that infrastructure is defined broadly to include 'innovation-oriented' or 'soft' infrastructure as well as 'traditional' or 'hard' infrastructure (i.e. education, research and the development of knowledge-based activities as well as the provision of roads and services). It is further seen that, in respect of the planning function of local authorities, allowance should be given to facilitating 'deal-making' with developers/landowners regarding projects with employment potential, subject to the need to ensure good planning etc. Sound planning and job creation are not mutually exclusive and it is important to bear in mind that the incentives of developers/landowners and local authorities are often closely aligned (with the requirement that local authorities should act to serve the wider public good above all else). As outlined subsequently in the report, the incentives of local authorities and developers can be closely in the area of FDI.

⁶ Any local authority regulations, requirements or practices that may (inadvertently) place barriers in front of businesses may be disproportionately restrictive and should be considered for relaxation or removal. In the process, local authorities need to ask themselves the question as to whether the regulation, requirement or practice is really necessary or justified – who does it benefit and does it facilitate entrepreneurship and jobs?

⁷ Some local authorities and/or business support organisations are effective gatherers of such information and their intelligence of local business needs can put them at an advantage in accessing financial supports to help businesses (e.g. from the EU) (the availability of information on business needs can make a difference to funding applications by increasing the score given to "project need/rationale", for instance).

⁸ The local authority reform process also includes other changes that signal the intention of local authorities to become service-oriented – for example, county managers are now chief executive officers (CEOs) and there is a view that elected members act as a board of directors, acting in the best interests of customers (households and businesses funding local authorities).

Box 2.2: How Local Authorities can Generally Assist Economic Development

- Planning and Infrastructure
 - 'Traditional'
 - Maintenance and improvement of roads, energy etc.
 - Planning – facilitating 'deal-making' with job creation potential (subject to zoning and looking after the wider public interest etc.)
 - 'Innovation-oriented'
 - 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 etc.
- Business support
 - Provision of information regarding what supports are available through LEOs and other State agencies – it is important that LEOs develop a reputation among businesses for being effective in their knowledge and understanding of available supports and for signing-posting clients towards the most relevant sources of support for their needs (and to do this in a fast and efficient manner, with as little bureaucracy as possible)
 - LEOs are also expected to act as brokers to clients having export potential *vis-à-vis* Enterprise Ireland
 - Reaching out to other publicly funded business support agencies having the same incentives in respect of promoting local economic development and jobs as part of enhanced/streamlined business support
 - Acting proactively as a 'one-stop shop' for micro and small enterprises (non-EI/IDA Ireland)
 - Being available to listen, and respond where necessary, to larger enterprises (EI and IDA Ireland client firms) on issues that local authorities can directly address
 - Thinking 'enterprise' in setting commercial rates and incentivising job creation through reduced contributions, waivers etc.
 - Reducing as far as possible red-tape and ensuring that there are no disproportionate requirements on local businesses (tendering, compliance etc.) (thinking 'competitiveness' and 'better regulation')
 - Monitoring good/best practices in other local authorities and adapting accordingly
 - Being alert to external funding opportunities of potential benefit to local businesses and the local economy – e.g. EU funding opportunities
- Data and intelligence
 - Making available data and analysis on 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 in economic developing planning and involve a system of information/data capture, review and performance assessment to guide such planning
 - Being aware of the economic potential of particular intelligence unique to local authorities in their day-to-day work
- Other
 - Organising and/or facilitating relevant events or structures (e.g. investment, business support, networking, tourism, demonstrator projects)
 - Continued focus on reducing local authority costs and ensuring that they are passed on to businesses and households in the form of reduced rates and charges
 - Bringing to the attention of central government any issues requiring action for the betterment of enterprises, households and the local environment (built and natural) (i.e. advocating on behalf of local businesses in a manner complementary to the advocacy role players by local chambers/business groups)
 - Never not being available – 'can-do' attitude and actions.

Source: *Putting People First* (supra footnote 2) (Appendix 1 of that document), consultancy team review/analysis.

Note: The lists of examples and functions provided by local authorities in respect of enabling economic development set out in *Putting People First* are reproduced in the Annex to this report (Box A1-Box A3).

2.4 Local Government Reform Act 2014

The Local Government Reform Act 2014 came into effect on 27 January 2014 and makes legal provision for the reforms set out in Putting People First (2012), including the economic development functions assigned to local authorities.⁹ At a high level, the reforms will see the establishment of local community development committees (LCDCs), which will replace the former county development boards (CDBs). Local authorities and LCDCs will be required to prepare local economic and community plans (LECPs) (six-year period) to be approved by local authorities. The LECPs will 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”.¹⁰

Section 44 of the Local Government Reform Act 2014 provides information on the content of LECPs and the processes in respect of their preparation and approval. The legislation provides that LECPs will pertain to the promotion of economic development within the relevant local authority functional area (as well as the promotion of local and community development within the functional area). More particularly, Section 44 provides that “promotion of economic development includes but is not limited to”:¹¹

- Creating and sustaining jobs;
- Promoting the interests of the community, including;
 - Enterprise and economic development across economic sectors
 - Foreign direct investment (FDI)
 - Indigenous industry
 - Micro enterprises and SMEs
 - Tourism
 - Agri-food
- Identifying local attributes that are essential;
 - To enhancing local economic performance, including
 - Accessibility, physical character and infrastructure
 - Employment opportunities and quality of life
 - To promoting local economic activities
- Supporting enhancement of local innovation capacity, including investment in RD&I, up-skilling and re-skilling;
- Helping businesses to better identify and respond to opportunities for growth;
- Identifying local strengths, weaknesses and deficiencies relevant to economic performance; and
- Identifying economic potential and the requirements to realise it.

⁹ The new legislation is available at <http://www.environ.ie/en/Legislation/LocalGovernment/LocalGovernmentAdministration/FileDownload,35715,en.pdf>.

¹⁰ *Ibid.* (p. 52).

¹¹ *Ibid.* (Section 44, sub-section 66B.(2), pp. 67-68).

Beyond these items to be contained in the economic development/economic elements of LECPs, as distinct from the community elements, which are provided for separately in Section 44 but yet are intended to be linked and integrated with the economic elements, there are no further (final) details on the specific economic elements of LECPs.¹²

Section 44 of the Local Government Reform Act 2014 also provides that LECPs will be consistent with the core strategy and the objectives of the development plans of local authorities and any regional, spatial and economic strategy applying to the area covered by LECPs. It is also required that both the community as well as the economic elements be integrated into the LEC (in a consistent way). A further requirement for the economic elements of LECPs is that there is consultation with members of the public *via* a public notice inviting members of the public to make observations or other submissions in writing to the local authority and to have regard to them when preparing the economic elements of the LEC. This consultation process is in addition to consulting with those public authorities or publicly funded bodies having the capacity or ability to contribute to economic development in the functional area. Section 44 also provides for the approval of LECPs by local authorities and regional authorities (i.e. the relevant regional authority in which the local authority is contained). All LECPs are to be published under Section 44. The same section also provides for the implementation of the economic elements of the LECPs plus the monitoring and review of the economic elements of the LCEPs (review to occur at least once within a period of 6 calendar years after it was made). Each local authority shall also include in its annual report an assessment in relation to the implementation and, where appropriate, review of its LEC, pursuant to Section 44.

2.5 New Regional Assemblies

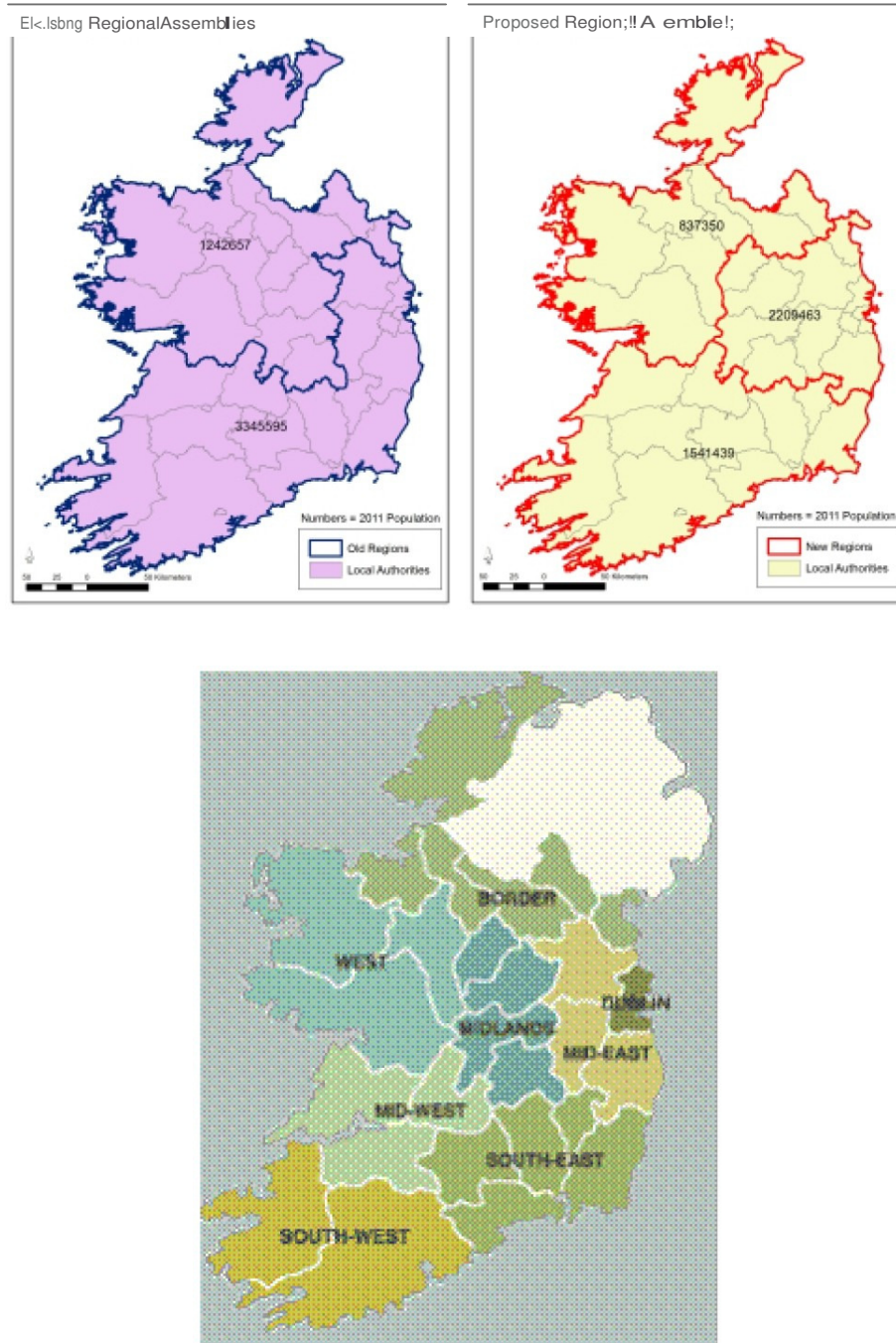
Putting People First (2012) plans that regional structures and functions will be revised and strengthened with replacement of the existing eight regional authorities and two regional assemblies by three new regional assemblies to perform an updated range of strategic functions. The new regions will be as follows:

- Connacht-Ulster Region;
- Southern Region (the province of Munster and the Leinster counties of Carlow, Kilkenny and Wexford);
- Eastern-Midland Region (the counties of Leinster other than those in the Southern Region) – Meath will be contained in this region.

A map illustrating the proposed new regional assembly areas is presented below and also shown are the existing regional assembly areas and regional authority areas (bottom panel).

¹² In March 2014, the Planning Sub-Group on Alignment within the Department of Environment, Community and Local Government (DECLG) published the document Draft Guidelines for the Community Element of the Local Economic and Community Plans, which does include some provision for the economic elements of LECPs. It is not clear (at the time of drafting this report in September 2014) when the specific criteria for the economic elements of the LECPs will be made available but Section 44 gives a reasonable high-level guidance and the variables referred to in the new legislation are treated during the course of this report.

Figure 2.1: Map of the Proposed Regional Assembly Areas and Existing Regional Areas



Source: Department of Environment, Community and Local Government (DECLG), *Putting People First* (supra footnote 2).

It is intended that the new regional assemblies will be considerably streamlined compared with the existing regional assemblies and will be responsible for adoption of strategies and other statutory functions. This implies that the LECP for Meath will be required to be adopted by the proposed new Eastern-Midland Regional Assembly, in the context of the regional spatial and economic strategy for the region.

In the eyes of some commentators, the proposed Eastern-Midlands Regional Assembly area, which includes Metropolitan Dublin and surrounding counties, makes sense. They also see the inclusion of County Louth in this proposed new region as sensible, as it will support spatial planning in the context of the Dublin-Belfast Corridor, which is seen as having significant economic development potential.¹³

The proposed new regional assembly areas also raise questions as to the status of the current Regional Planning Guidelines (RPGs) for the GDA. The idea/understanding is that the current regional guidelines will run their natural deadlines. However, the current regional planning guidelines were developed for the period 2010-2022. Between now and then, there is the issue of who will enforce these guidelines in the context of the new regional assembly areas.

2.6 National Spatial Strategy (NSS) 2002-2020

Commentators who have reacted positively to the proposed new regional areas – particularly the Eastern-Midlands Regional Assembly area – also see the new arrangements as an opportunity to re-design or overhaul the National Spatial Strategy (NSS) 2002-2020 (the well-known high-level map of which is reproduced below in Figure 2.2).¹⁴

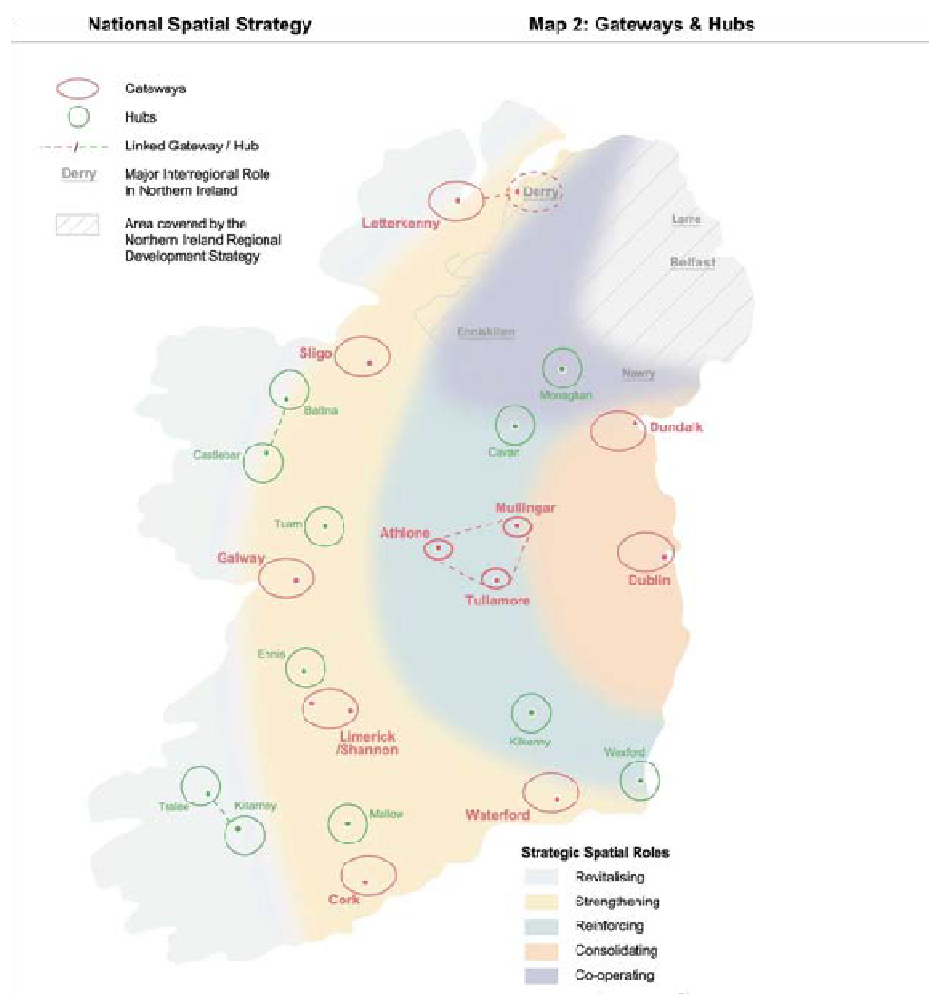
At the core of the NSS are the Gateways and Hubs, with most economic development envisaged to occur in the former. The NSS has been criticised by some as too aspirational and overly preoccupied with the vague concept of ‘balanced’ growth, when the reality is that Ireland is a very small country with a very small number of urban centres with any critical mass. In the eyes of some commentators, the GDA is viewed as the only location within the country with sufficient critical mass to compete in the international marketplace for FDI.

We do not completely share this opinion and the experience to date has been at variance with the Dublin-centric viewpoint: while Dublin has gained a large share of all FDI into Ireland, it is nonetheless the case that smaller urban centres around the country have also done well in respect of attracting new FDI and growing their existing FDI companies. 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 (FDI is considered further below) (however, we caution against taking FDI into Ireland for granted, given intensifying competition from lower cost countries and concerns in the US and Europe over the treatment of corporation tax, *inter alia*).

¹³ See, for example, <http://irelandafternama.wordpress.com/2012/10/16/new-regional-assemblies-announced/>. However, it is fair to say that the economic potential of the Dublin-Belfast Corridor has yet to materialise in a significant way but local authorities either side of the border have nevertheless been working to realise the opportunity (for example, Louth County Council and Newry and Mourne District Council, who together signed the Memorandum of Understanding (MoU) between the two local authorities in Brussels in March 2011, an initiative that has been praised by the European Commission) (http://www.louthcoco.ie/en/Services/Business_Support_Unit/Memorandum_of_Understanding.pdf).

¹⁴ *Supra* footnote 13.

Figure 2.2: Map Summarising the National Spatial Strategy (NSS) 2002-2020



Source: NSS 2002-2020.

According to the CSO's population projections ('M2FS Recent' method), the most rapidly growing part of Ireland in the coming years will be the Mid-East Region (Counties Meath, Kildare and Wicklow):

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

During the same periods, Dublin (four local authority areas) will also grow more rapidly than the State and the Greater Dublin Area (GDA) 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.

While Meath is at the heart of this key region of Ireland (whether narrowly defined under the existing GDA delineation or more broadly under the proposed new Eastern-Midlands Regional Assembly area), it is fair to say that the county has not fared well in the Gateways and Hubs under the NSS 2002-2022: there are no such designations in Meath; Dundalk has acted as the regional Gateway for the NE Region and Dublin for the wider Leinster/national territory – both have achieved well in attracting FDI, with Dundalk doing well in recent years.¹⁵ On the other hand, Navan and Drogheda (both Louth and Meath parts) are classified as ‘Primary Development Centres’ under the NSS, which basically links them to the GDA as towns with a population greater than 5,000 persons and “strategically placed, strong and dynamic urban centres” (p. 78).¹⁶

Further on in the NSS (p. 80), it is stated that:

“The Primary Development Centres need to aim at a population level that supports self sustaining growth, but which does not undermine the promotion of critical mass in other regions. This suggests an ultimate population horizon of up to 40,000 people for the primary development centres. In addition, Drogheda’s close functional and physical links with the GDA highlights a need to consider its role in the spatial development of the GDA when reviewing the Strategic Planning Guidelines for the GDA”.

After the Primary Development Centres, the next categories of towns in the NSS settlement hierarchy pertaining to the GDA are (somewhat confusingly): “<5,000 Town”; “1,500-5,000 Town”; and “Urban Centres (circa 1,000)” (the first category label of “<5,000 Town” makes no sense given the other categories).¹⁷

In Meath, the relevant settlements are: Ashbourne (falling into the first-named of these categories) (and Maynooth); Duleek, Dunboyne and Dunshaughlin (falling into the second-named category); and Athboy, Enfield, Oldcastle and Ratoath (in the third-named category). Kells and Trim are each classified in the NSS as both towns with a population of between 1,000 and 5,000 people and an “Urban Strengthening Opportunity” (Kells is seen in the NSS to lie at the junction of two “National Transport Corridors”, namely the M3/N3 linking Dublin with Cavan, Sligo and thence south Donegal and the N52 linking the Dundalk Gateway with Athlone-Mullingar-Tullamore, designated as a “Linked Gateway” under the NSS) (however, Trim does not lie on any National Transport Corridor).

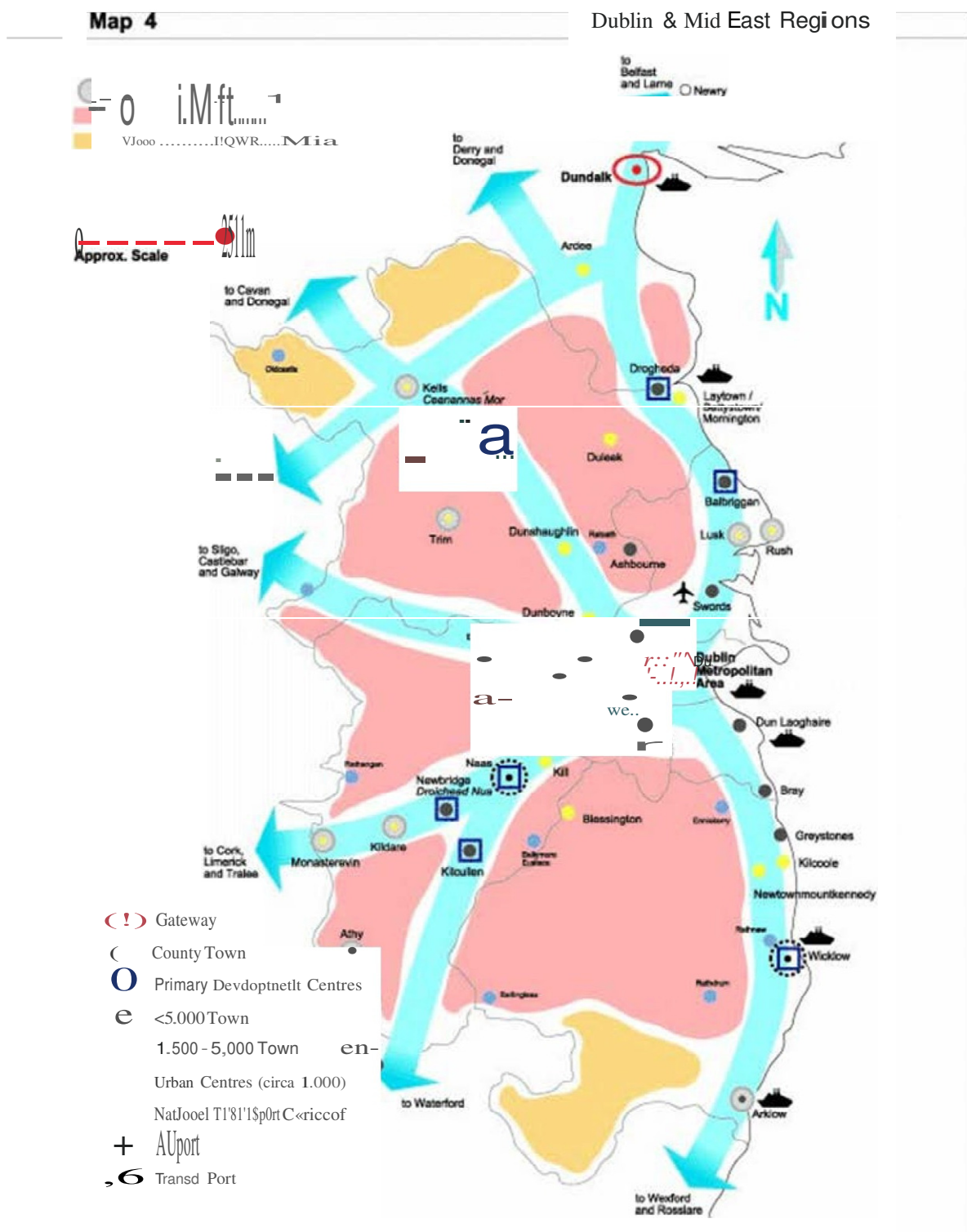
The settlement hierarchy and main transport links pertaining to the GDA (Dublin and the Mid-East Regions), as provided for in the NSS, are reproduced in Figure 2.3 below.

¹⁵ Illustration of Dundalk’s/Louth’s performance in attracting FDI during 2010-2012 is provided in the PMCA review of the Louth Economic Forum (2012) (the study is available at http://www.louthcoco.ie/en/Services/Business_Support_Unit/Louth_Economic_Forum/_Action_Plans/Louth_Economic_Forum_Report_July_2012.pdf).

¹⁶ The other Primary Development Centres in the NSS occurring in the GDA are: Balbriggan (Fingal), Naas, Newbridge and Kilcullen (in Kildare) and Wicklow Town (Wicklow). Navan, Naas and Wicklow Town are also designated as the County Towns of Counties Meath, Kildare and Wicklow respectively.

¹⁷ Given the other categories, it is presumed that it should be “>5,000 Town” (i.e. it is a ‘typo’ in the NSS).

Figure 2.3: Map of Dublin and the Mid-East Regions in the National Spatial Strategy (NSS) 2002-2020



Source: NSS 2002-2020.

Table 2.1 provides a mapping of the Meath settlements against the settlement hierarchies according to the NSS. Navan is the principal settlement, designated as both a County Town and a Primary Development Centre, with Drogheda as a Primary Development Centre. Ashbourne is designated as a <5,000 Town (should be >5,000) and each of Kells, Trim, Duleek, Dunboyne, Dunshaughlin and Laytown/Bettystown-Mornington is designated as a 1,500-5,000 Town, within which Kells and Trim also have the designation of “Urban Strengthening Opportunity”. Each of Athboy, Enfield, Oldcastle and Rataoth is classified as Urban Centres (circa 1,000). Further on in this section, we will compare how the NSS designations of Meath settlements compare with those in the RPGs of the GDA 2010-2022 and with those of the Meath CDP 2013-2019, remembering that the latter two documents were published a number of years after the NSS.¹⁸

Table 2.1: Hierarchy of County Meath Settlements in the National Spatial Strategy (NSS) 2002-2020

Settlement	National Spatial Strategy (NSS) 2002-2020 Settlement Hierarchy							Urban Centres (circa 1,000)
	Gateway	Hub	County Town	Primary Dev Centre	<5,000 Town	1,500-5,000 Town	Urban Strength Opp	
Navan			✓	✓				
Drogheda				✓				
Ashbourne					✓			
Kells						✓	✓	
Trim						✓	✓	
Duleek						✓		
Dunboyne						✓		
Dunshaughlin						✓		
Laytown/Bettystown/Mornington						✓		
Athboy								✓
Enfield								✓
Oldcastle								✓
Rataoth								✓

Source: NSS 2002-2020, consultancy team review/analysis.

Note: The NSS category “<5,000 Town” makes no sense given the other categories of “1,500-5,000 Town” and “Urban Centres (circa 1,000)” (given the other categories, it is presumed that it should be “>5,000 Town”).

Ashbourne is designated in the NSS as a “<5,000 Town”, even though the population of the town today is well in excess of 5,000.

¹⁸ The NSS Update and Outlook report was published in October 2010 and outlines that the objectives of the NSS have generally been successful in facilitating significant investment in public infrastructure such as transport, housing, better water services and waste infrastructure.

2.7 Spatial Planning and National Roads: Guidelines for Planning Authorities 2012

Introduction

Published in January 2012 by the DECLG, the Spatial Planning and National Roads Guidelines set out planning policy considerations relating to developments affecting national roads (including motorways, national primary and national secondary roads) outside the 50/60 kilometers per hour (kmh) speed limit zones for cities, towns and villages.¹⁹ They aim to facilitate an integrated and consistent approach to support the goal of achieving and maintaining a safe and efficient national road network in the broader context of facilitating sustainable economic growth and development throughout the country.

The guidelines also incorporate the principles set out in Smarter Travel: A New Transport Policy for Ireland 2009-2020, which outlines policy objectives with respect to promoting a significant modal shift from private transport to public transport and sustainable transport modes over the period up to 2020 (including the provision of cycling and walking networks as well as increasing public transport).

The Spatial Planning and National Roads Guidelines are required to be implemented by local authorities, transport authorities and An Bord Pleanála (ABP) to ensure that the State's investment in national roads is harnessed in a manner that is sustainable in economic, social and environmental terms.²⁰

'Strategic Traffic'

The Spatial Planning and National Roads Guidelines refer to 'strategic traffic', which "primarily comprises major interurban and inter-regional traffic, whether HGV [heavy goods vehicle], car, public transport bus services or other public service vehicles, which contributes to socio-economic development, the transportation of goods and products, especially traffic to/from the main ports and airports, both freight and passenger related".²¹

The guidelines continue to advise that:²²

"In particular, any local transport function of national road bypasses and relief roads in respect of the urban areas they pass through is, and must continue to be, secondary to the role of these roads in catering for strategic traffic. Therefore, the planning system must ensure that the strategic traffic function of national roads is maintained by limiting the extent of development that would give rise to the generation of short trip traffic on national roads or alternatively by ensuring that the trip demand from future development will primarily be catered for on the nonnational network".

Accordingly, the guidelines state that there "is an onus on developers, and local authorities in their role as planning and road authorities, to devise and implement local transport solutions for traffic/trip demand generated by local development so that the latter requirements can be catered for in a manner that is complementary to and consistent with the strategic transport function of the national road network".²³

¹⁹ <http://www.environ.ie/en/Publications/DevelopmentandHousing/Planning/FileDownload,29322,en.pdf>.

²⁰ The roles of the various stakeholders involved in the implementation of the guidelines are outlined in high-level terms in Chapter 4 of the 2012 guidelines.

²¹ *Ibid.*, p. 3.

²² *Ibid.*

²³ *Ibid.*

Plan-Led Development

The Spatial Planning and National Roads Guidelines proceed to set out a number of key principles to guide developments from a national transport perspective. These include the requirement that “development should be plan-led”, meaning that “in preparing development and local area plans, planning authorities must assess the trip generation aspects of any land use zoning objectives and how such trip generation is to be catered for, promoting the use of sustainable modes, while protecting the strategic function of the national roads network”.²⁴

Another key principle highlighted in the guidelines is that local authorities and the National Roads Authority (NRA), and other public transport bodies, work closely together. In particular:

“It is vital that, in the course of preparing plans and assessing planning applications, the relevant planning authority, the National Roads Authority and other statutory bodies with responsibility for transport services and road infrastructure provision work closely together to ensure that future development is guided to suitable locations”.²⁵

Close Working between Local Authorities and Transport Agencies

The Spatial Planning and National Roads Guidelines also advise that local authorities and the NRA should work together during the early stages of plan preparation to identify any areas where a less restrictive approach may apply. Local authorities should consult at a very early stage with transport infrastructure providers (including the NRA) and, in the GDA, with the National Transport Authority (NTA).

Within the GDA, which includes Meath, the NTA also has a significant role in the planning, delivery and management of existing and new road infrastructure, through, *inter alia*, the preparation of:

- A strategic transport plan;
- An integrated implementation plan;
- A transport traffic management plan; and
- Traffic management guidelines.

Statutory and non-statutory consultation with the NTA and the NRA is therefore also essential for local authorities in the GDA in ensuring that their plans are consistent with these 2012 guidelines (which set out overall recommended content for local authority development plans).²⁶

Interchanges and Junctions

The Spatial Planning and National Roads Guidelines of 2012 also highlight the importance of interchanges/junctions as especially significant elements of national road infrastructure that development plans and local area plans must take account of and carefully manage.

However, in certain circumstances, the guidelines provide that additional junctions, or enhancements to existing junctions on national roads, may become necessary to service development needs of national and strategic importance or in cases where a proposed development is demonstrated by the planning authority to be more appropriately located proximate to such junctions. In such circumstances, the guidelines state that the “NRA will support such capacity enhancements and development proposals” but subject to “all” of a set of criteria being met, which together are stringent.

²⁴ *Ibid.*, p. 4.

²⁵ *Ibid.*

²⁶ The recommended content of development plans is summarised in Box 2.3, *Ibid.*, p. 10.

Box 2.13 of the 2012 guidelines provides a tool aimed at ensuring consistency between spatial planning and transport considerations, with provisions for *modal shift* from private to public transport, *access*, *environmental effects* and *funding and delivery mechanisms*.²⁷

2.8 Retail Planning Guidelines for Planning Authorities 2012

Introduction

The Retail Planning Guidelines for Planning Authorities were published by the DECLG in April 2012.²⁸ They aim to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector for the benefit of the consumer in accordance with proper planning and sustainable development. In addition, these guidelines have been designed to support the vitality and viability of city and town centres, thereby contributing to a high standard of urban design and encouraging a greater use of sustainable transport.

Retail Policy Context – Settlement Hierarchy

Like the aforementioned Spatial Planning and National Roads Guidelines,²⁹ it is intended that a plan-led approach be adopted in respect of retail planning. Retail development is required to follow the settlement hierarchy of the State and should be appropriate to the scale and function of the settlement or part of the settlement in which it is located as designated by the NSS, relevant regional planning guidelines and development plan core strategies. There should be a general presumption against large out-of-town retail centres – in particular those located adjacent or close to existing, new or planned national roads/motorways – under the guidelines. In regard to settlement hierarchy, Drogheda is mentioned as a large town with an important regional retailing function; below that, Navan is identified as a settlement with performing an important sub-regional function.

Retail Caps

In line with the requirements of the EU-IMF bailout programme for Ireland, the DECLG commissioned a study from Forfás report to examine the potential economic impacts of eliminating the previous caps on the size of retail premises. The study recommended some adjustments to the caps in the previous guidelines in relation to regional differentiation regarding the retailing function of Dublin and the regional cities but otherwise found “that a cap on store size would serve to avoid local market dominance and monopolies and thereby promote both competition and city and town centre vitality”.³⁰ On foot of the Forfás study, and given public consultation responses to the draft guidelines, a new set of retail caps were specified in the 2012 finalised Retail Planning Guidelines as follows (net floorspace retail caps):

- 4,000m² in the four Dublin local authority areas (i.e. Dublin City, Fingal, South Dublin and Dún Laoghaire-Rathdown County Councils);
- 3,500m² in the four other main cities of Cork, Limerick/Shannon, Galway and Waterford; and
- 3,000m² in the remainder of the State (i.e. those areas outside of the four Dublin local authority areas, and the cities of Cork, Limerick/Shannon, Galway and Waterford).

²⁷ *Ibid.*, p. 23.

²⁸ <http://www.environ.ie/en/Publications/DevelopmentandHousing/Planning/FileDownload,30026,en.pdf>.

²⁹ *Supra* footnote 19.

³⁰ *Supra* footnote 28 (p. 13).

Retail Development Management

County development plans are required to set out the most appropriate locations for the level of retailing appropriate to any particular settlement given the settlement hierarchy and in some cases may include the quantum of floorspace required, according to the Retail Planning Guidelines of 2012.

In some cases, a retail impact assessment and a traffic and transport assessment may be necessary for out-of-centre retail developments and these are provided for in the guidelines.

Competition Authority Concerns over the New Retail Caps

The Competition Authority has for a number of years been engaged in assessing whether competition is working in Irish grocery markets, and has published a series of reports as part of its Grocery Monitoring Project, which commenced in 2008. These reports have examined the structure and operation of the retail and wholesale levels of the grocery sector and retail planning policy. The Competition Authority has identified that both the wholesale and retail grocery sectors are concentrated. It has also found that, although there do not seem to be barriers to entry at the wholesale level, the retail planning guidelines act as a barrier for retailers wishing to enter the market.³¹

The Competition Authority has expressed concern that the Retail Planning Guidelines (2012) do not implement one recommendation of its reports on the retailing sector, namely to remove blanket caps on the size of retail stores. Instead, the Retail Planning Guidelines (2012) apply a different set of blanket caps to the previous ones – higher in some areas and lower in others. As a result of this, the Competition Authority considers that “Ireland is unlikely to see the kind of large-scale discount retailers that exist in other countries and the lower prices that go with them”.³²

Meath County Retail Strategy

The Meath County Retail Strategy was prepared in 2011, the aim being to ensure that the key settlements in the county, particularly the County Town of Navan, fulfil their role as set out in the Retail Planning Guidelines. The strategy provides advice regarding the broad quantum, scale and type of retail development required in Meath. It examines details of existing shopping patterns within the county and levels of expenditure leakage, based on household and shopper surveys, and it includes key policies and objectives to protect and enhance town centres and guide retail development over the lifetime of the Meath CDP 2013-2019.

Retailing is provided for in Sub-Section 4.5 of the Meath CDP, within the current Economic Development Strategy. The policies and objectives contained in that part of the CDP are generally consistent with the Retail Planning Guidelines (2012) and reflect the findings of the survey conducted as part of the 2011 Meath County Retail Strategy (which found significant levels of comparison expenditure leakage from the county with almost 60% of residents carrying out their main comparison shopping (clothing/footwear) outside of the county).

Retailing is a critical component of the local economy of Meath. The delivery of the strategic policies and objectives of the Meath County Retail Strategy, which aim to promote the retail role and function of centres within the county and reduce leakage of retail expenditure, are important and implicit within the formulated Economic Development Strategy in this report.

³¹ The Competition Authority is the principal body responsible for the implementation of competition law in Ireland. Irish competition law reflects EU competition law, one of the building blocks of the Common Market. In November of this year, the Competition Authority merged with the National Consumer Agency.

³² <http://www.tca.ie/en/Promoting-Competitio/Market-Studies/Grocery-Monitor-Project.aspx>.

2.9 Food Harvest 2020

Introduction

Although relatively small in employment terms, there is no questioning the fundamental role played by agri-food in the Irish economy. Agri-food, comprising primary and secondary production, and tertiary services, ranks alongside med-tech, pharma-chem, ICT and internationally-traded services as an economic activity for which Ireland has an international comparative advantage, as manifest by positive net exports. The difference with agri-food is that it is largely indigenous; whereas the competitive advantages observed in the other sectors named are attributable in large part to the FDI firms that have been successfully attracted to the country (and these comparative advantages are equally important).

Owing the importance of agri-food to the Irish economy, there is a well-established and intricate system of public finance and support to the sector. The Department of Agriculture, Food and Fisheries (DAFF) oversees the sector and provides the overarching policy direction. DAFF is also the parent department to the key agencies in the sector, namely Teagasc, Bord Bia and Bord Iascaigh Mhara (BIM). Enterprise support and development to the sector is the remit of EI, which extends to supporting foreign-owned firms in the sector as well as Irish-owned agri-food enterprises. Teagasc is concerned with supporting vocational agricultural education and advice on farm household incomes and viability, and research and innovation within the agri-food sector with primary agriculture as its foundation. Bord Bia has responsibility for the promotion of Irish food both at home and among export markets. It has also developed the Q-mark quality assurance programme and the Origin Green Programme on the sustainability of Irish food products. While Bord Bia has in recent years been ascribed the task of promoting Irish seafood, the development of the sub-sector is the remit of BIM and research is provided by the Irish Marine Institute. In addition, a number of other state bodies and publicly-funded organisations are active in supporting enterprise in rural areas, including LEADER companies like Meath Partnership outlined earlier.

Goals of Food Harvest Strategy

Food Harvest 2020 sets out three ambitious sector-level targets to be achieved by 2020 over a baseline period of 2007-2009 for primary output, value added and exports of:

- An increase of €1.5 billion or 33% in primary output from the agriculture, fisheries and forestry sectors;
- An increase of €3 billion in the value added by the agri-food, fisheries and wood products sector, representing a 40% increase on 2008;
- Achieving an overall export target of €12 billion for the sector, representing a 42% increase compared to the 2007-2009 average.

The vision in achieving these targets is summarised in the graphic below, which is reproduced from Food Harvest 2020. The strategy roadmap to achieving the vision is based on applying the concepts of 'Act smart, Think green and Achieve growth' to each constituent part of the sector (beef, dairy, sheep, horticulture, organics, pigmeat, cereals, poultry, seafood, forestry and biocrops).

Figure 2.4: Vision of Food Harvest 2020



Source: Food Harvest 2020.

The overall vision and supporting strategy sought in Food Harvest 2020 seeks to address key challenges for the Irish agri-food sector by achieving diversification and “premiumisation” (i.e. higher value) of Irish food products in key markets domestically, and in the UK and EU, by capitalising on its environmental and sustainable production credentials (‘Think green’), and addressing the intense competitive pressures in Ireland’s key markets by improving productivity and cost competitiveness (‘Act smart’) to ‘Achieve growth’ (sustainable growth).

The delivery of Food Harvest 2020 is underpinned by over 200 specific actions across a broad range of issues and areas. This work is being overseen and co-ordinated by a High Level Implementation Committee (HLIC) under the Chairmanship of the Minister for Agriculture, Food and Fisheries. The main support agencies – Teagasc, Bord Bia, EI and BIM – feature on the HLIC.

In the Milestones for Success 2013 report on progress of Horizon 2020, DAFF observed that all of the end of 2013 milestones have been met or are on target (in the context of the targets set out in the Action Plan for Jobs 2013). The overall 2020 targets, as stated above, remain challenging and mid-term progress on achievement of these goals will be carried out in 2015.

Agri-Food Promotional and Trade Events – National Ploughing Championships

The main and varied supports to the agri-food sector include major agricultural and food events, including the National Ploughing Championships and Bloom in the Park. Every year, Meath is host to the Moynalty Steam Threshing Festival, which this year took place on 14 August 2014 (Sunday) (Moynalty was awarded Ireland’s Tidiest Town in 2013).

The National Ploughing Championships is run by the National Ploughing Association (NPA) every September (3-day event) and the iconic event is believed to be largest outdoor event of its type in Europe, with almost 200,000 people attending and over 1,000 trade and exhibitor stands. While the primary activity is competition ploughing, many visitors to the event are attracted to the extensive tent/marquee exhibition area built around a network of laid all-weather tracks and pedestrian walkways with representation from the complete supply chain (agricultural co-ops and food companies, finance, insurance, seed, feed and fertiliser) plus regulatory bodies and representative organisations. Exhibition and demonstrations include agricultural machinery to a comprehensive showcase of livestock breeds, animal husbandry and management, motors, forestry, bio energy, business management and regulatory bodies. The exhibitor space includes education, business, craft village, food fair, health, lifestyles, home and garden, sports and leisure, tourism, fashion and, in 2013 for first time, the Ideal Homes Show. Activities include fashion shows, sheep dog trials, log digging, hunt chase, sheep shearing competitions, celebrity chef cookery demonstrations, outdoor radio broadcasts, celebrity visitors including sports stars and TV personalities. The event has developed into a major and attractive family day out, with something for everyone.

It has been some years since Meath last hosted the event and it is understood that the next opportunity to host the National Ploughing Championships will arise in 2017, which we understand from our consultations will tie in with the World Ploughing Championships coming to Ireland. Given Meath's agricultural tradition and its excellent road network and proximity north and south, this could be a unique opportunity for the county to host this especially major event in three years time. The timing of the national event with the world event would provide a unique opportunity for Meath to promote itself internationally, to various audiences.

Agri-Food and Climate Change

Climate change and global warming are perhaps the major long-term issues confronting the world. There is a relationship (in principle) between climate change and Ireland's agricultural sector because methane (CH₄) is one of the main greenhouse gases (GHGs) and cattle (cows) are among the main sources of methane, while at the same time being fundamentally important to Ireland's grass-based beef and dairy production, which contribute significantly to agri-food exports.³³

However, the data suggest that methane emissions are not a significant issue in Ireland. Latest data reveal that methane emissions in Ireland in 2010 have returned to approximately their level in 1990, having peaked in 2000 (measured in thousand metric tonnes of CO₂ equivalent).³⁴

The 1997 Kyoto Protocol committed developed countries to reduce their collective emissions of GHGs by at least 5% compared to 1990 levels by the First Commitment Period (2008-2012). As a signatory to the Kyoto Protocol, Ireland committed to limiting its annual GHG emissions to 13% above 1990 levels by the First Commitment Period. Ireland's methane emissions in 2010 were less than 1% above those in 1990. Nevertheless, the authorities in Ireland are not complacent about the challenge and Teagasc has been conducting research on controlling the growth of methane emissions from agriculture – these efforts are in addition to Ireland's renewable energy action plan, aimed at controlling GHGs.

Combating climate change presents challenges for all economic sectors (not just agri-food) but also offers opportunities in renewable energy technologies, like biomass, which is provided for in the Meath CDP 2013-2019 (in respect of helping to develop the rural economy).

³³ The other main GHGs are carbon dioxide (CO₂), nitrous oxide (N₂O), ozone (O₃) and chlorofluorocarbons (CFCs).

³⁴ See, for example, <http://www.factfish.com/statistic-country/ireland/agricultural+methane+emissions>.

2.10 Foreign Direct Investment (FDI) and IDA Ireland's FDI Strategy

IDA Ireland's Horizon 2020

Ireland's inward investment promotion agency, IDA Ireland, is responsible for the attraction and development of FDI in Ireland. Launched in 2010, Horizon 2020 is the organisation's strategic blueprint for attracting FDI into Ireland in the coming years. It recognises the fluidity of FDI and that countries and companies best able to continuously adapt and renew themselves will be most likely to harness opportunities. The strategy envisages that Ireland is well-placed to win new investments that will create thousands of high-quality jobs across the country. The investments will come from the development of existing client companies, industries and markets, and they will also originate from new initiatives, including companies in their home countries 'going multinational' for the first time.³⁵

Horizon 2020 sets out a road-map of what is needed to fuel Ireland's future success with leading global corporations. These are expressed in the IDA's 'Ten Steps of Transformation', namely:

- Drive company transformation;
- Win employment-intensive services investments;
- Win new forms of foreign investments;
- Support regional economic development;
- Increase investment from new emerging high growth markets;
- Target new emerging and small technology companies;
- Enhance Ireland's brand and reputation overseas;
- Embrace 'open innovation' philosophy;
- Strengthen Ireland's value proposition; and
- Increase collaboration within 'Team Ireland'.

The success of the strategy will depend to a large extent on collaboration among all stakeholders in the Irish economic eco-system to continuously adapt to the changing nature of FDI. At the time of the formulation of Horizon 2020, in 2010, the stakeholders highlighted in the strategy were government, higher education institutions (HEIs), existing multinationals in Ireland and indigenous entrepreneurs as well as the IDA and its sister agencies, like EI (Team Ireland).

The Horizon 2020 strategy concludes with a series of six Team Ireland policy enablers necessary to enhance the country's environment to continue to attract overseas investment in the future:

- Improve competitiveness to ensure that Ireland's work practices and cost base make the country a highly attractive location for a variety of employment-intensive projects with multinational companies;
- Ensure that the tax regime remains compelling when compared to those in other locations;
- Ensure that Ireland quickly enhances its broadband infrastructure and deploy next generation networks enabling the most advanced uses of cloud computing technology – across the whole country;
- Ensure that Ireland's energy infrastructure delivers world-class networks and energy at a competitive price;
- Continually enhance the education system and training programmes to ensure that Ireland has a workforce with relevant skills to support advanced RD&I activities.

³⁵ The next phase of Ireland's FDI policy, following-on from Horizon 2020, is outlined further in Box 2.3 below.

Experience to Date

The experience in implementing the IDA's Horizon 2020 strategy to date has been positive, with growth returning to the number of permanent full-time persons working in foreign-owned companies in Ireland since 2011. If one examines the major trends by sector, it is seen that Ireland is successfully attracting foreign-firms in internationally-traded services and high-tech manufacturing, specifically medical technologies and pharmaceutical-chemicals or 'med-tech' and 'pharma-chem' respectively. The country is also succeeding in growing existing multinational employment and among the targeted new investments are 'first-time' multinationals. IDA Ireland and EI are acting together to maximise linkages between FDI firms and local suppliers to facilitate maximisation of economic impact.³⁶

In an update for the first six months of 2014, IDA Ireland announced in early July 2014 that over 100 investments were secured in the first half of the year, compared with 70 for the same period in 2013. Of the investments secured, 40% have come from companies investing in Ireland for the first time, with the remainder represented by expansions and transformations by existing companies.³⁷

The IDA's Annual Report for 2013³⁸ shows that at the end of 2013 there were 161,112 people working at IDA client companies, a new record for the FDI sector in Ireland. Since late last year, IDA Ireland has also taken on responsibility for 55 companies in the Shannon region, bringing total employment at IDA client companies to 166,184 people. There were 13,376 gross jobs created in 2013.

The rationale for FDI in a small, open economy like Ireland that is part of a much larger integrated market (namely the EU) is immediately apparent. First, FDI firms are a key part of Ireland's international trading performance: while employment in foreign-owned firms accounts for less than 10% of all employment in the country, the vast majority of Ireland's exports are due to FDI firms. Second, and related to the first point, FDI brings high quality jobs and competitive advantage. Third, FDI has significant economic impact, not least in local economies within host regions – higher pay, up-skilling and re-skilling, and local purchases permeate the wider economy through multiplier effects. Fourth, contrary to what is sometimes erroneously perceived or stated in the media, the subsidiaries of foreign-owned companies in host locations tend to exhibit significantly greater longevity, and therefore job retention, compared with other (indigenous) firms – which accords with *a priori* expectations given that multinationals are generally special firms that have acquired or developed competitive advantages for which there is international demand and/or cross-national production capability.³⁹

³⁶ According to recently released Eurostat data (20 June 2014), the US is by far the biggest inward investor to the EU: 2013 preliminary results show that Ireland received €8.4 billion in FDI from the US in that year, representing 3% of all US FDI into the EU28 or about three times Ireland's share of the EU28 population.

³⁷ <http://www.idaireland.com/news-media/press-releases/irelands-investment-perfo/index.xml>.

³⁸ <http://www.idaireland.com/news-media/publications/annual-reports/>.

³⁹ McCloughan, P. and Stone, I. (1998) 'Life Duration of Foreign Multinational Subsidiaries: Evidence from UK Northern Manufacturing Industry 1970-93', *International Journal of Industrial Organization*, Vol. 16, No. 6, pp. 719-47. See also Lyons, B. R. and McCloughan, P. (1998) 'Uncle Sam's Ireland: The Nature and Impact of Foreign Multinationals in the Irish Economy', in *Inward Investment, Business Finance and Regional Development*, pp. 100-115, eds. Hill, S. and Morgan, B., Macmillan, ISBN 0-333-66827. According to the Review of Industrial Performance and Policy 2003 by the then Department of Enterprise, Trade and Employment (now the DJEI) observes (p. 9): "An analysis of enterprise survival rates among grant-aided overseas and indigenous firms that commenced operations between 1980 and 1994 revealed that foreign-owned firms were more likely to be still in existence in 2000 than their Irish-owned counterparts" (details of the greater durability of foreign-owned enterprises are presented later in the report, pp. 83-84) and the same report remarks that (p. 9) "In

2.11 FDI Performance in Meath

Enterprise Development – Relatively Strong Indigenous but Low FDI Employment

Appraising Meath's performance in FDI, including in recent years, in the context of Horizon 2020, is best carried out by looking at both indigenous and foreign-owned enterprise development. In our analysis of enterprise development in the county – the detailed results of which are presented subsequently in the report – it is observed that Meath performs relatively well in respect of Irish-owned employment but much less strongly in regard to employment in foreign-owned or FDI firms.

According to our analysis of the CSO POWSCAR data (POWSCAR denoting Place of Work, School or College – Census of Anonymous Records, which was conducted as part of Census 2011), there were a total of 38,822 (fixed location/occupation) jobs in Meath in that year, of which 28,449 jobs were held by people living and working in the county and the remaining 10,373 jobs were held by people living outside of Meath (inbound commuters). In addition, a further 32,942 jobs were held by people living in Meath but working outside of the county, meaning that of the 61,391 jobs held by residents of the county in that year, almost 54% were held by outbound commuters. In this regard, outside of the capital, Meath has the highest outbound commuter rate of any local authority area in the country and one may conclude that, proportionately speaking, Meath is the largest commuter county in the country (we would expect commuting rates among the four local authority areas making up Dublin to be high in any event). Detailed analysis of the outbound commuters (and the inbound commuters) is presented subsequently in Section 7 of the report and we note here that the principal working destination of the outbound commuters from Meath is Dublin (accounting for over three-quarters of all outbound commuters, within which Dublin City is the largest local authority destination) and that Louth and Kildare also account for a reasonable share of the outbound commuters (shares of 10% and 7% respectively). Many of the outbound commuters from Meath are employed in FDI firms in Dublin, Louth (mainly Dundalk, which is where most FDI in that county is located, and Kildare, which has been successful in attracting large-scale high-tech manufacturing multinationals).

Data specially provided to the consultancy team from Forfás – the State enterprise development advisory agency – shows that there were 4,654 permanent full-time jobs in agency-assisted (chiefly Enterprise Ireland) Irish-owned firms in Meath in 2011, equivalent to 12% of the aforementioned 38,822 positions within Meath in that year.⁴⁰ The corresponding figure for the State was 8%. Furthermore, the Forfás data that we have reviewed also show that between 2011 and 2013 the number of permanent full-time jobs at Irish-owned agency-assisted companies in Meath grew by 14%, well ahead of the corresponding figure for the country as a whole (4.7%). Thus, it may be reasonably inferred from the data that agency-assisted indigenous (predominantly EI client company) jobs are performing well in Meath and this in turn reflects what we consider to be fairly deep-rooted comparative advantages among Meath's indigenous enterprises (in activities like mining, cement manufacture and engineering).

view of the greater resources and market power of foreign-owned firms, however, their survival and job retention rates could reasonably be expected to be higher than those of domestically-owned businesses".

⁴⁰ From August 2014, Forfás will be dissolved and will form the core of the Strategic Policy Division of the Department of Jobs, Enterprise and Innovation.

However, when we turn to FDI employment, Meath's performance is less strong. Analysis of the Forfás data considered by the consultancy team reveals that less than 3% of all jobs in Meath in 2011 were held by people working in foreign-owned companies, whereas the corresponding proportion for the State was almost 8%. Thus, the *density* of FDI jobs in Meath is relatively low. In addition, during 2011-2013, the number of permanent full-time jobs among foreign-owned agency-assisted (IDA Ireland) companies in Ireland grew by 7%; the corresponding figure for Meath showed shrinkage of 2%.

There therefore appears to be a 'dichotomy' in the employment performance between agency-assisted indigenous firms (mainly under EI) and foreign firms (under IDA Ireland) in Meath, with the latter showing low density and low growth compared with the high density and high growth attributable to the EI client firms in the county. A major challenge for the Economic Development Strategy for Meath is to grow both types of business in the county – which will entail maintaining the strong track record in respect of the indigenous enterprises and at the same time working to significantly enhance employment in foreign-owned firms, in turn necessitating enticing new FDI as well as growing employment among the existing FDI firms in Meath.

Meath's comparatively muted performance in FDI – over a number of years – reflects a number of factors, including the absence of any significant designation of its urban settlements under the NSS and competition from other locations (like Dublin, Dundalk and Kildare but also locations like Galway and Cork, and more recently Limerick, Waterford and Athlone, which are also hoping to improve their FDI performance). As a result, Meath has struggled to attain a sense of critical mass in respect of FDI, which has meant a low profile for the county in terms of prospective new inward investment and ultimately a low number of IDA Ireland site visits. The danger, generally speaking, is that a lack of FDI can be a self-perpetuating process, in which low investment is associated with less interest from prospective overseas firms, and less opportunity for a location to exhibit 'demonstrator' effects may lead to a low number of site visits, scarce new FDI jobs announcements and smaller FDI. *In Meath's case, if the FDI deficit is not addressed proactively, it risks becoming even more of a 'satellite' county to Dublin with even greater flows of outbound commuters to locations like Dundalk and Kildare as well as the capital in the years ahead.*⁴¹

Generally speaking, regions or areas with relatively high levels of existing FDI tend to be more attractive to new inward investment for these reasons (there is demonstration that the location can accommodate FDI) and, for FDI agencies like IDA Ireland, the economic impact of new FDI will tend to be greater in locations with a comparably large stock of multinationals (Dublin has such critical mass in Ireland and places like Cork, Galway and Dundalk are accumulating greater stocks of FDI, which helps to attract more inward investment).

Positively, given Meath's attributes and assets, we believe there is scope to enhance the county's FDI performance and this will entail more proactive promotion of the county from a regional perspective and at the same time showcasing its own unique qualities as an attractive host location. *In a nutshell, we consider that Meath can credibly present itself as a cost-competitive centre located in the heart of the most dynamic, productive and innovative part of Ireland with a plentiful supply of relevant skills and seamless connectivity to international markets.* It also has a supply of serviced strategic sites with FDI potential, which are appraised subsequently in the report. The recent EU designation of Kells and environs in the north of the county is also significant from an FDI perspective, as well as promoting enterprise development overall, and this is also considered later in the report.

⁴¹ The comparatively low number of IDA Ireland site visits (with potential FDI companies) in Meath in recent years is evident in the data presented in the Annex of Supplementary Information (Table A1, p. 264).

An important element in the overall package of attractions for FDI generally relates to advanced purpose buildings (APBs) on serviced sites. In addition, it is also important that these features are made known to IDA Ireland (it should not be assumed that the IDA has knowledge of every county's FDI attractions and in practice it is largely up to each location to engage proactively with the IDA in seeking to attract FDI, and this is one of the central recommendations made later in the report).

A More Detailed Look at FDI and Ireland's Success in Attracting Inward Investment

To appreciate the potential for Meath to enhance its FDI performance in the coming years, it is necessary to understand the FDI process more generally and appreciate Ireland's key advantages, which we consider can be applied to Meath, with Meath County Council being central to the process.

Genesis of Multinationals and Reasons for Locating in Ireland

Companies that 'go multinational' by opening up production facilities abroad are generally enterprises that have gained or developed a competitive advantage in their home countries and/or for which there is an international demand for their products and/or services. The decision to become a multinational enterprise as opposed to exporting to overseas markets from the home country is a long-term rate of return decision by the company concerned and is influenced by a number of factors. In Ireland's case, these include the common external tariff maintained by the EU in respect of imports from outside the EU, which basically increases the cost of exporting and pushes the decision towards the multinational option, *ceteris paribus*. Once the prospective FDI firm has made the choice of locating in Europe, it may be attracted to Ireland for a range of reasons. These include the country's educated, skilled and flexible labour force, the existing stock of multinational enterprises (which helps to demonstrate Ireland's capacity to host FDI firms) and the country's comparably low corporation tax rate. But Ireland's success as a host location for FDI also reflects other (unique) factors, including the proactive approach taken by the IDA in learning about and responding to the changing international marketplace for FDI – as highlighted in Horizon 2020.

Ireland has managed to successfully grow a significant share of a particular slice of the FDI market globally, namely high-tech manufacturing/assembly operations and back-office/administrative support functions for multinational enterprises. The former include the production of pharmaceutical products and ICT equipment, while the latter include the opening of companies' Europe, Middle East and Africa (EMEA) offices in Ireland, which service significant parts of the investing firms' international operations.

The skills sought by these investors in Ireland tend not to be core skills (e.g. Google does not seek to source software development expertise in Ireland because the firm's home country has a comparative advantage in that regard); rather the multinational companies seek more specific, complementary skills when investing in Ireland. In respect of administrative support, these skills include accounting, IT support (not software development), legal, compliance/standards and languages, including Middle Eastern/Arabic and Asian languages as well as European languages. In regard to production operations, the skills sought include industrial and process engineering, 'Six Sigma', lean manufacturing and testing, where there now exists a possibility of Ireland becoming an international hub for production standards (e.g. ensuring that the products of multinationals produced globally are suitably tailored to the needs of different markets around the world).⁴²

⁴² Through its success in pharmaceuticals, biotechnology and medical devices over the years, multinational operations in Ireland have gained strong proficiency in the standards set by the US Food and Drugs Administration (FDA), which pertain to a range of products in these and other areas, including food, cosmetics and animal and veterinary products.

Thus, through a combination of factors, Ireland has ploughed a successful furrow in respect of FDI in *particular* areas; it is unlikely that Dublin will rival the City of London or New York in terms of funds *management* or that the city or other parts of the country will compete with Silicon Valley in respect of software development – but in areas like funds *administration* and EMEA/global middle- and back-office support functions, it is fair to say that the country is well-placed internationally as a host location for the medium-term at least (i.e. during 2014-2022).

There is empirical evidence to support these observations, the most immediate and perhaps telling being the statements made by the companies themselves when announcing new investments and jobs in Ireland. These are outlined presently but before that it is relevant to note the results of independent survey evidence regarding Ireland's FDI offering. According to an Indecon survey of foreign-owned companies in Ireland conducted in 2009, the most highly rated people resources by FDI firms in Ireland are "skilled employees" (34.3% of respondents to the survey stated that the availability of skilled workers was a significant strength) and "flexible labour force" (32.4% significant strength); on the other hand, "quality of research and development" was not seen as a significant strength (5.6%).⁴³ "Unit labour costs" emerge as an issue for FDI into Ireland, with over 60% of respondents saying that this is a weakness of the investment environment in the country. Other weaknesses apparent in the Indecon survey of 2009 include "competitiveness of housing costs and property prices" and "competitiveness of other cost elements", with a majority of respondents signalling them as weaknesses for Ireland. On the other hand, the survey results show that 62.4% of investors rate Ireland's "comparative corporate tax rate" as a significant strength and a further 33.9% of respondents identify this factor as a strength feature. Other strengths include "english-speaking population", "membership of euro and stability of exchange rates", "track record of successful foreign investment" and "government support for FDI".

On Ireland's corporation tax rate, Indecon observes that:⁴⁴

"Ireland maintains a low general corporation tax rate by ensuring a wide tax base. The Irish 12.5% corporate rate applies to traded activity and as such is not focused on any particular segment of Irish industry. There is no distinction between small and large enterprises or between indigenous Irish or multinational enterprises".

Since the Indecon study, which was published in 2010 (the survey of multinationals was carried out in 2009), the Irish corporation tax rate and tax arrangements with other countries have come into sharper relief. While Ireland will continue to have autonomy over its tax rates, including the corporation tax rate, the challenge for overall economic policy is to ensure that the country continues to strive to enhance its competitiveness on a range of fronts, including costs, which are highlighted as an issue in the Indecon survey. Owing to the increasing importance placed on multi-lingual skills since the Indecon survey was conducted in 2009, this is another important attribute that requires attention – owing to the very low take-up of foreign languages courses in Irish higher education institutions (on which evidence is presented later in the report). In our engagement with multinational enterprises operating in Meath, a clear preference was expressed for having 100% (native) fluency in foreign languages in the provision of international support services and this relates to immigration and/or the availability of international students with the necessary skills.⁴⁵

⁴³ Gray, A. W., Swinand, G. P. and Batt, W. H. (2010) 'Economic Analysis of Ireland's Comparative Advantages for Foreign Investment', self-published by Indecon Economic Consultants.

⁴⁴ *Ibid.* (p. 75).

⁴⁵ On the issue of corporation tax and/or corporation tax competition to secure FDI, Ireland is participating in the OECD's Base Erosion and Profit Shifting (BEPS).

Recent IDA Ireland Announcements Illustrating the Current FDI Process in Ireland

A number of recent IDA Ireland announcements and openings exemplify these features relating to Ireland's attractiveness as a host location for expanding/existing multinationals and companies going multinational in Europe for the first time. For example, on 10 April 2014, IDA Ireland announced that SurveyMonkey, a leading online survey/questionnaire platform, will be opening an office in Dublin with immediate hiring for a variety of roles ranging from account management to customer support (requiring multi-lingual ability).⁴⁶ A few days later, on 14 April, ENERCON, a leading supplier for onshore wind energy turbines, opened its new European sales office in Santry, Dublin. ENERCON's Dublin team, comprising 22 people initially, will have sole responsibility for sales, project management, electrical engineering, logistics coordination and site assessment in Ireland. ENERCON has been active in Ireland since 1998 and operates five service stations across the country, with 130 people currently working in the field of installation and servicing of wind turbines (the firm operates factories in eight countries and has more than 17,000 employees worldwide).⁴⁷ On the same day, another foreign-owned company – Ethicon Biosurgery – announced plans to develop an €80 million state-of-the-art manufacturing facility providing approximately 270 jobs at the National Technology Park, Plassey in Limerick. This is an example of the high-tech manufacturing FDI to which IDA Ireland is committed to attracting to Ireland. Speaking at the announcement, Ethicon, which is part of the Johnson & Johnson Family of Companies, said that the decision to manufacture EVARREST™ Sealant Matrix in Ireland was due to the unique clustering of medical device manufacturing, automation and bio-manufacturing skill sets across the Johnson & Johnson firms already operating in Ireland – illustrating that regions within the country can benefit from other regions within the country in which multinationals are already present.⁴⁸

Yet further examples of the nature of FDI currently occurring in Ireland are provided by the recent announcements of BioMarin and Becton, Dickinson and Company. On 2 May 2014, BioMarin Manufacturing Ireland, a subsidiary of BioMarin Pharmaceutical Inc., announced that it expects to expand its Dublin operation, with the creation of up to 50 new jobs in its Dublin Global Commercial Operations Hub. The Dublin operation has responsibility for international supply chain, logistics and high level commercial decision-making, including price, distribution and third-party contracts for the launch of VIMIZIM, an enzyme replacement drug for the treatment of MPS IVA, a lysosomal storage disorder. The company will recruit senior accounting, finance, customer service and marketing positions (i.e. support functions). The expansion complements the growth in BioMarin's biopharma manufacturing facility in Shanbally, Co. Cork, which is expected to grow to 140 employees by 2015 to support the anticipated commercial demand of VIMIZIM. BioMarin expects to have a combined total employment of approximately 200 people in Ireland by the end of 2017. The BioMarin example illustrates an FDI firm in Ireland active in both high-tech manufacturing and international support services, requiring skills in engineering/manufacturing, accounting/finance, legal/compliance, marketing and customer service.⁴⁹

⁴⁶ SurveyMonkey was established as recently as 1999 and employs 275 people worldwide. It is headquartered in California. The IDA Ireland press release is available at <http://www.idaireland.com/news-media/press-releases/surveymonkey-to-open-dubl/index.xml>.

⁴⁷ The IDA Ireland press release on the ENERCON development is available at <http://www.idaireland.com/news-media/press-releases/leading-wind-energy-manuf/index.xml>.

⁴⁸ EVARREST™ Sealant Matrix is a product designed to aid in stopping bleeding during surgery. The IDA Ireland press release on the Ethicon announcement development is available at <http://www.idaireland.com/news-media/press-releases/ida-announces-investment--1/index.xml>.

⁴⁹ The IDA Ireland press release on the BioMarin announcement development is available at <http://www.idaireland.com/news-media/press-releases/biomarin-expands-its-dubl/index.xml>.

On 7 May 2014, Becton, Dickinson and Company celebrated the 50th anniversary of its plant opening in Drogheda with an announcement of a €16 million (\$22 million) investment in new equipment to expand its production of BD PosiFlush™ syringes and create up to 20 additional jobs in Drogheda.⁵⁰

Turning to an example of a recently-formed multinational that has invested in Ireland, *The Irish Times* recently carried an article about Ireland's positives, and competitors, in respect of inward investment. It describes how the founder and CEO of Qualtrics – a research software company – blogged on the Wall Street Journal recently that his company has taken on 50 people in Dublin since it began hiring in October 2013 and that Dublin is a “talent factory” thanks to its “top universities”.⁵¹

A survey conducted by the Federation of International Banks in Ireland (FIBI) and published on 14 May 2014 (when FIBI held its annual conference in Dublin) reported a significant improvement in Ireland's attractiveness as a location for international banks: 69% of respondents see Ireland as an attractive location compared to 55% in a similar survey in 2013.⁵²

Importance of Advanced Purpose Buildings (APBs) in the FDI Process – Three Examples

As part of our consultations during the course of this study, we also spoke with senior personnel within IDA Ireland. They highlighted the importance of Meath's favourable location in a region with critical mass in a number of respects, including skills, access to international markets (by virtue of the county's proximity to Dublin Airport and Dublin Port) and existing multinationals, which acts as a positive demonstrator for future inward investment. The IDA also highlighted the importance of APBs on serviced (unencumbered) sites, which would present as a ‘turn-key’ or ‘almost ready’ (flexible) proposition for potential investors (that they could tailor to meet their particular needs, with the support of the IDA and/or local authorities). According to IDA Ireland, the availability or near availability of such buildings on serviced sites (ready-to-go) is much preferable to potential investors than greenfield-only sites because there is something concrete and tangible to show prospective investors. Subsequently in the report, we further consider this opportunity in light of serviced sites around the county.

Illustration of the importance of APBs in the FDI process is provided by reference to a number of other recent IDA Ireland announcements (in addition to those outlined above), namely the IDA's advanced technology building programmes in Athlone, Waterford and Letterkenny plus the recent announcement of additional jobs at PayPal's Dundalk facility. The provision of advanced technology buildings is also provided for in the Action Plan for Jobs 2014.

⁵⁰ The IDA Ireland press release on the BD announcement for Drogheda is available at <http://www.idaireland.com/news-media/press-releases/bd-celebrates-50-years-in/index.xml>. However, in the first week of September 2014, local newspapers in the town (*Drogheda Independent* and *Drogheda Leader*) carried a story about the decision by Japanese multinational electronics manufacturer Rexxam (formerly Ryo-Syo) to cases operations with the loss of 70 jobs.

⁵¹ The *Irish Times* article is entitled (somewhat negatively) ‘IDA fails to Egnyte US tech company's interest’ (18 April 2014) and also mentions that Dublin recently missed out on 100 new jobs when another company, Egnyte, a Silicon Valley-based business file-sharing firm, picked London over Dublin: the CEO of Egnyte described London as “the most vibrant tech hub in Europe”.

⁵² See <http://www.rte.ie/news/business/2014/0514/617207-morning-business-news/?RTEMAILID>.

Example 1: APBs in Athlone and Waterford

On 24 April 2014, IDA Ireland announced that it has signed contracts to build two new APBs in Athlone and Waterford, designed to meet the future needs of IDA client companies across the spectrum of manufacturing and technology activities.⁵³ This is the first time since the early 1980s that IDA Ireland has funded and managed the construction of an advanced property solution for the marketplace. The investments are supported by the Department of Jobs, Enterprise and Innovation. Commenting on the new initiatives in Athlone and Waterford, the CEO of IDA Ireland (Barry O’Leary) stated that (our italics):

“The availability of high quality property solutions is a key component in winning FDI projects. These initiatives will advance the product offering for both Midlands and the South-East and therefore underpin the conversion of projects from IDA’s pipeline. Furthermore, these initiatives by IDA will address the current deficit of suitable property solutions and promote investment into regional locations. IDA’s direct intervention to construct these buildings is due to the absence of private funding available to do so.”

The Midlands building will be located at the IDA’s Garrycastle Business and Technology Park, Dublin Road, Athlone, Co. Westmeath. The development will consist of an advanced technology building of approximately 2,674m², part two-storey and part-double height single storey, with associated infrastructure. The Waterford building will be constructed at IDA Technology Park, Butlerstown, Cork Road, Waterford. The development will comprise of an advanced technology building of about 2,348m², part-two storey and part-double height single storey, with associated infrastructure.⁵⁴

According to the IDA Ireland announcement, both buildings have been designed to high standards using materials such as natural stone and specialist metal cladding systems. The designs incorporate subtle soft landscaping taking reference from the surrounding landscape, which compliments and integrates the new building within the existing business and technology park. The building layout has taken account of the requirement of potential end users for flexibility by creating front-of-house open plan office areas with the potential for sub-division. The rear open plan production area offers flexibility for large scale open plan use or again the potential to sub-divide or introduce cellular spaces.

The proposed buildings will be of high quality environmental design which will be designed and built to achieve the globally recognised US Green Building Council (USGBC) LEED (Leadership in Energy and Environmental Design) Silver standard. Employment across the two projects will be in the region of 160-180 over the construction cycle.⁵⁵

⁵³ The IDA Ireland press release on the new advanced technology buildings in Athlone and Waterford is available at <http://www.idaireland.com/news-media/press-releases/ida-to-resume-building-in/index.xml>.

⁵⁴ In the recent feature on Waterford in *The Sunday Business Post* (‘Waterford: Change is on the Horizon’, 31 August 2014), Mr. Ray O’Connor (the IDA’s Regional Business Development Officer) remarked: “In certain locations, such as Dublin and Cork, maybe the private sector will take up the mantle of delivering property solutions. In other locations, we need step in. We chose Waterford as a location because we’re trying to drive investment here”.

⁵⁵ On 30 June 2014, IDA Ireland announced that NuVasive, a US medical device company, will establish an international operations centre in Waterford, with the creation of up to 30 skilled roles over the next two to three years. According to the announcement (<http://www.idaireland.com/news-media/press-releases/nuvasive-inc.-establishes/index.xml>), the company has begun hiring supply chain, customer service, accounting, and IT positions. Based in San Diego, California, NuVasive is focused on developing minimally disruptive surgical products and procedures for the spine. The spine market is the largest segment within the global orthopaedic market, with the European market expected to achieve significant growth on the account of

Example 2: New Science Park Building in Letterkenny

On 1 May 2014, it was announced by the Department of Jobs, Enterprise and Innovation that preparatory work has commenced for the construction of a new 20,000ft² science park building at Letterkenny Institute of Technology (LYIT), representing an investment of €4.5m.⁵⁶ The new facility will be aimed at enhancing the development of science, research and innovation in the (cross-border) North West. The initiative, in tandem with a similar facility in Derry City, is a cross-border project, co-funded by the EU's Regional Development Fund through the INTERREG IVA Programme, by the Department of Jobs, Enterprise and Innovation and by the Northern Ireland Department of Finance and Personnel.

The new building in Letterkenny will serve as an extension to the existing CoLab facility at LYIT, which currently houses well over 20 companies employing over 100 graduate-level employees. CoLab aims to provide a supportive environment to enable its tenant companies to grow, and benefit from cooperation with the academic community and students on the LYIT campus. In this way, CoLab aims to contribute to the development of an innovation ecosystem within the wider cross-border NW region.

It is intended that the new facility in Letterkenny will provide 13 new business units and significant research space. The target is that it will support over 60 high-end jobs. It is also hoped to develop 3 cross-border clusters (involving Enterprise Ireland and Invest Northern Ireland) and that the facility will help to secure one additional FDI project into the NW region each year.

The project is being delivered through a cross-border partnership involving the Northern Ireland Science Park, LYIT and led by the North West Cross Border Group (NWCBG), which comprises the five local authority/district councils serving Derry/Londonderry, Donegal, Limavady, Magherafelt and Strabane and Magherafelt, which has developed several projects under INTERREG.

The new initiative in Letterkenny will accompany the development of the Forte George site on the banks of the River Foyle in the Derry City Council Area, the works on which have already commenced. The Derry building will comprise 50,000ft² with the Letterkenny development comprising 20,000ft².

Example 3: PayPal's Expansion in Dundalk

On 18 June 2014, payments company PayPal announced the creation of another 400 jobs at the eBay Inc. European Operations Centre in Dundalk, which will be in addition to the 1,000 PayPal positions announced in 2012. This will bring the combined PayPal and eBay employee numbers in Dundalk to 1,850 by 2018.⁵⁷

PayPal is seeking to fill roles in the areas of customer solutions, risk operations, merchant services, telesales and operational excellence. The roles are primarily English-speaking and PayPal also has a number of other language opportunities.

an aging population, a growing number of younger patients, changing lifestyles and product innovations. It is intended that the company's Irish facility will support its growth in the European market.

⁵⁶ See <http://www.djei.ie/press/2014/20140501.htm>.

⁵⁷ The IDA Ireland press release on the Dundalk announcement is available at <http://www.idaireland.com/news-media/press-releases/paypal-announces-400-extr/index.xml>.

Commenting on the new investment, Barry O’Leary, CEO of IDA Ireland said that (our italics):

“PayPal’s growth in Dublin and Dundalk is one of the largest projects the IDA has ever been involved in bringing to Ireland. PayPal have found an ideal combination of talent, great infrastructure and *suitable property* in Dundalk. The success of this company is an example that we as IDA executives bring around the world when we pitch for Ireland in boardrooms from Boston to Bombay.”

Earlier, on 11 June 2014, IDA Ireland launched ‘Connect & Invest – Dundalk’, the latest phase of its digital marketing initiative for attracting inward investment by highlighting the specific attributes of individual regional urban centres. ‘Connect and Invest – Dundalk’ is an interactive experience designed for use on tablet, smartphone and PC. Information on location, education, lifestyle and existing IDA and indigenous companies is provided through rich images, video and text and will be continuously updated. The website allows IDA executives to showcase Dundalk in face-to-face client meetings. The new initiative includes FDI and indigenous firms in Meath (e.g. Coca-Cola, Irish cement). IDA Ireland launched the series with ‘Connect & Invest – Waterford’ in September 2012 and followed this with ‘Connect & Invest – Sligo’ in December 2012. ‘Connect & Invest – Midlands’ was launched in March 2014.⁵⁸

In its aforementioned 2014 half-yearly statement in early July 2014 (which also saw the launch of IDA Ireland’s Annual Report for 2013),⁵⁹ the importance of ‘property solutions’ to Ireland’s portfolio of FDI attractors is also highlighted (our italics):

“Due to the successful FDI performance of recent years, *available property solutions are vital to continue growing Ireland’s portfolio of companies*. Demand for prime office space in Dublin, in particular, remains intense and IDA welcomes recent news that An Bord Pleanála has approved a planning scheme for the *Dublin Docklands Strategic Development Zone*, providing capacity for the city in future years. IDA looks forward now to companies accelerating their plans in that area”.

“IDA itself is providing property solutions in regional locations such as Waterford, Athlone and Letterkenny, where the provision of such facilities will position the locations to win FDI”.⁶⁰

(Additional) Example 4: Premium on Office Space for FDI in Dublin

As the economic recovery gathers momentum, office space is becoming a premium in Dublin, where media reports suggest strong demand from FDI firms, including prospective inward investors.⁶¹

⁵⁸ The link to ‘Connect & Invest – Dundalk’ is available at <http://www.idaireland.com/connect-and-invest/dundalk/>.

⁵⁹ *Supra* footnotes 37 and 38.

⁶⁰ With the recent announcement of a new CEO for IDA Ireland, it is expected that the Horizon 2020 strategy will be revised and this is referred to by the organisation in its half-yearly update for 2014 (*supra* footnote 37). See Box 2.3 below (p. 47).

⁶¹ For example, an interview with property investment company Hibernia REIT plc on RTÉ Radio One’s *Morning Ireland* on 24 July 2014 indicated that the company is acquiring office space in Dublin (including from the National Asset Management Agency, NAMA) in response to, and in anticipation of, demand from FDI firms for such space in the capital in the coming months and years.

(Final) Example 5: IFS State Street in the IDA Business and Technology Park Drogheda

Another example of the importance of property solutions to the FDI process comes from within Meath. IDA Ireland opened the IDA Business and Technology Park on the Donore Road in Drogheda in 2006, with an approximately 23,000 ft² office building in the same year. The building was occupied by IFS State Street (funds administration, over 200 employees) in that year, the only tenant in the park to date.⁶²

Consultations with Existing Multinationals in Meath

To further understand the skills and other requirements of FDI companies in Ireland – more specifically in Meath – we consulted with a range of FDI firms in the county, including senior representatives of FDI firms serving on the MEF.⁶³

Existing multinationals in Meath include US, UK, Italian, German, French, Dutch and Chinese companies active in a range of sectors – financial services, shared services, med-tech, investment fund management, biotechnology and various manufacturing – located across the county, namely in Navan, Drogheda, Dunboyne, Trim, Enfield, Ashbourne and Slane. They employ a wide range of skills in services, including IT, and manufacturing – at different levels from junior through middle management and senior management. In terms of foreign languages, where they are required, there is a discernible preference among companies for people having the foreign languages sought as their mother tongue or first language. This requirement is particularly important for international hubs and call centres (i.e. business-to-business or B2B and business-to-customer or B2C): people with mother tongue foreign language capability can pick up subtle inflections in calls with overseas people, which is important to effective customer management.

Resourcing is a key issue for FDI firms and this entails having the right facilities (site and building – including space to expand), people and relationships with IDA Ireland and local authorities (giving comfort that they are on the side of the investor and will assist in addressing any issues that need to be resolved). Flexibility and a can-do attitude are important attributes that inward investors look for in local authority partners, which come together in being able to fix any problems. In terms of people resources, while recruitment tends to occur internationally as well as nationally, it is reported that FDI firms in Meath generally have no major issues in sourcing the skills sought – owing to the favourable location of the county within the GDA and its transport connectivity within the region (including the links between the M1, M2, M3 and M4 and the M50 Dublin orbital, which can mean that journey times between the Dublin suburbs and locations in Meath are lower or at least on par with Dublin-Dublin journey times). Most recruitment is nationally and for FDI firms in Meath this involves a combination of local labour and the Dublin labour pool: it is evident from our engagement with FDI firms that many recruits have previously worked with other multinationals in Dublin, suggesting a willingness to work closer to home (if the opportunity presents itself).

⁶² Speaking after his appointment as a ‘Super-Junior Minister’ in the Cabinet reshuffle earlier this year, Mr. Gearld (‘Ged’) Nash TD remarked (our italics): “There were some near misses over the last few months in terms of major employers coming to Drogheda. *One of the problems that we have here is the lack of developed space for large employers*”. The article from which this quote is taken is from the *Drogheda Leader* (‘Under the Spotlight Special’, p. 18, 23 July 2014). Ged Nash is TD for the Louth constituency, which includes parts of east/coastal Meath in the vicinity of Drogheda.

⁶³ The FDI firms represented on the MEF are Generali and Coca-Cola; Swedish firm Boliden, which operates Tara Mines, is also represented on the MEF. Irish-owned firms in Meath represented on the MEF are Dromone Engineering and Boyne Valley Group, with which we also consulted during the study.

It is interesting to observe the M50 and Port Tunnel as important factors enabling multinationals in Meath to access a wide skills pool. The multinationals consulted with tend to find Meath's location in respect of Dublin Airport to be very convenient because they have international visitors.

Overarching Issues regarding FDI in Meath

Having carefully considered the evidence and consulted with stakeholders, there are many and varied reasons for the low density of FDI in Meath but the principal reasons are three-fold as follows:

- Meath's FDI proposition is not compelling enough;
- There is insufficient liaison with IDA Ireland and we consider that this may reflect communication error or expectation that the IDA should know about what the county has to offer – but the reality is that the county needs to take a more proactive stance in promoting itself to the IDA, and continually so to reinforce the message and communicate new developments, and thence to the wider world of inward investment companies around the globe; and
- Infrastructure – where the particular issue is buildings or advance buildings on suitable serviced sites (the latter are necessary for FDI but the presence of buildings or the prospect of new buildings that can be kitted out quickly to the requirements of FDI firms on serviced sites is also very important).

How Meath may Address its FDI Issues

The good news, from our perspective at least, is that these issues are surmountable (but will require some effort and team-building between local stakeholders in Meath, most importantly Meath County Council, and IDA Ireland).

Meath's FDI story can be made more compelling by emphasising the significant regional dimension and the fact that it is seamlessly connected with region enabling access to;

- Wide range of key skills for services and manufacturing
- International and national markets *via* roads, airport and ports
- Innovation infrastructure – universities and institutes of technology (IoTs) in close proximity
- All these on relatively competitive terms (key differentiator to Dublin)

In regard to plugging into the IDA in a more proactive way, it should be borne in mind that the agency has basically the same incentives as Meath, namely to ensure more (sustainable) FDI and Meath needs to promote itself as an available alternative having all the advantages of the region in which it is located on cost-competitive terms. Meath's story needs to be reinforced with the IDA *over and over again* through stronger relationship-building between Meath County Council and the State agency.

On infrastructure, progress needs to be made on advancing suitable available sites for FDI and on ensuring that developments meeting market needs can be realised ('deal-making' involving developers, FDI firms, IDA Ireland and Meath County Council – sustainable public-private partnerships resulting in sustainable economic growth and jobs). An inventory or audit of all available workspaces /offices etc. in the county also needs to be carried out – in order to accommodate the possibility that inward investors from time to time prefer to locate to smaller accommodation.

Box 2.3: Summary of Ireland's Next Phase of FDI Policy (Following the IDA Ireland's Horizon 2020)

On 30 July 2014, the Department of Jobs, Enterprise and Innovation published a policy statement on the next phase of FDI policy in Ireland, building on the gains made in recent years and IDA Ireland's Horizon 2020.

The policy statement, prepared with the support of Forfás,⁶⁴ finds that competition for mobile multinational investment has increased dramatically in recent years. It finds that many more countries now possess the basic conditions to attract investments – in areas like cost-competitiveness, competitive taxation regimes and effective investment promotion agencies. Its key finding is that, in order to compete effectively for mobile investment, Ireland must not only maintain high performance and compete strongly in traditional areas like tax and cost-competitiveness, but crucially differentiate itself in other ways. The key areas identified by today's policy statement are:

- *Talent* – Ireland must seek to become renowned internationally for the higher-order abilities of our workforce, in terms of problem-solving, creativity, design-thinking and adaptability, and Ireland must be internationally known for developing and nurturing talent at all skill levels and as an attractive destination for internationally mobile skilled people;
- *Technology* – Ireland cannot be world-leaders in all areas, but must achieve a record of world-leading research and innovation in key areas, in close cooperation with industry;
- *Great places to live and work* – Irish policy must deliver a choice of attractive locations for investment, playing to the strengths in different regions and providing regional locations that offer sectoral strengths, collaboration with education institutions and Irish companies, excellent infrastructure and quality of life;
- *Sectors* – Ireland must effectively identify and pursue opportunities in sectors where Ireland can attract investments and jobs and should implement a more systematic approach to sector development, including the appointment of specific Cluster Development Managers/Teams.

Delivery in these areas will depend not only on the performance of the development agencies, but crucially on other bodies including education, transport, planning, environment and justice organisations. The Action Plan for Jobs mechanism, which seeks to coordinate the delivery of job-creation policy by all 16 Government Departments and a wide range of Agencies, will be crucial in helping to deliver the new FDI strategy.

Other key actions identified in the policy statement include:

- Improve collaboration and intelligence-sharing between the State development agencies, both in-market and in Ireland;
- Pursue new FDI source markets, such as emerging economies and opportunities arising from new trade agreements;
- Target new forms of FDI, outside the traditional multinational corporation model so successfully targeted up to now – for instance, mergers and acquisitions (M&A), joint ventures, sovereign wealth funds, high net worth individuals, investment houses;
- Implement a series of actions to position Ireland as a leading location for start-ups and fast-growing businesses (i.e. first-time multinationals);
- Target a top-5 ranking for international competitiveness;⁶⁵
- Continue to commit to the 12.5% corporation tax rate; continue to take proactive action on multilateral reform of the international tax system; continue to focus on certainty, stability and predictability for investors; and continue to look at ways in which our corporation tax regime can be highly internationally competitive, in the context of the challenges and opportunities provided by changes in this area.

All of the actions contained in the new initiative apply equally to Meath as they do to the country overall.

Source: DJEI (http://www.djei.ie/publications/enterprise/2014/Policy_Statement_FDI_Ireland_July_2014.pdf), consultancy team review.

⁶⁴ See footnote 40 (p. 34) on the new role of Forfás within the DJEI.

⁶⁵ For Ireland's current position in this regard, see Figure 5.2 (p. 81) and the discussion around the chart.

Box 2.4: Brief History of Key Industrial and Enterprise Development Initiatives in Ireland

There is no doubt that Irish industrial and enterprise policy has witnessed significant evolution since the foundation of the State, and the patterns of employment in evidence today owe much to the changes that have occurred along the way. The experience illustrates that policy formation has necessarily adapted to the changing circumstances of the times and, in our view, a simplistic view is that incorrect choices were made at different periods – the options pursued were to a large extent the product of the times.

In the early years of the State, particularly during the 1930s, 1940s and 1950s, protectionist policies were pursued, by Ireland and other western countries – which served to deepen or prolong the economic crisis triggered by the Great Crash in 1929. Thus, the early 1930s saw the Control of Manufactures Acts, which restricted foreign ownership of new Irish factories. These decades were characterised by inward-looking economic policy with an emphasis on building scale among Irish firms. With the benefit of hindsight, much (inadvertent) damage was caused to the industrial fabric of the Irish economy during the 1930s and 1940s, with job losses occurring on an appreciably large scale as the lack of competitiveness resulting from the policies was exposed in the 1950s. The beginning of that decade saw the establishment of the IDA, which in subsequent decades would help to transform the industrial and enterprise landscape of the country.

A watershed moment occurred in 1958 with the strategy for economic development in that year, which recommended that the way forward was to end protectionism and embrace the challenge of open trade, which in the initial years would be painful as enterprises would have to adapt to a more competitive environment. That year saw easing of restrictions on foreign ownership of industry in the aforementioned Control of Manufactures Acts of 1932 and 1934. The following decade saw the Anglo-Irish Free Trade Area Agreement, which provided for the phasing out of the tariffs on most British goods during the following 10 ten years. In 1973, Ireland succeeded in joining the then EEC (European Economic Community), which meant the phasing out of tariffs on imports of almost all manufactured goods from member countries over the next five years (Ireland had earlier applied to join the EEC in 1961 but the application was withdrawn in 1963 because talks between Britain and the EEC over GB's membership collapsed).

Since joining the EEC in 1973, FDI grew strongly in Ireland over the next twenty years and the main industries in which the foreign-owned firms grew in the country were the manufacturing industries of electronics (mainly computer hardware), metals and mechanical engineering, chemicals and pharmaceuticals, and textiles and clothing. In the main, these sectors operated independently of the sectors in which Irish-owned enterprises were active, which included agri-food, wood/furniture, paper and printing, cement and glass etc. The 'dual' in Irish industry persisted for many years and, while it continues to remain in place today, it is less in evidence and there are more opportunities for linkages between foreign-owned companies and their Irish counterparts. Furthermore, while pharma-chem manufacturing continues to be a leading FDI sector in Ireland, the nature of FDI has been transformed since the early 1970s and today, with much greater emphasis on services – for example, ICT is currently much more focused on software than hardware, and internationally-traded financial and business services have become important for both indigenous and FDI firms. Also medical technologies (med-tech) industries have become more important and R&D and other economic impacts of FDI have been more embedded in the local economy.

The changes in the mix and rapid development of FDI in Ireland have been accompanied by a number of important policy changes during the period – which in turn have been informed by high-profile economic reports. In 1982, the review of industrial policy conducted by Telesis challenged the excessive reliance on foreign industry and proposed a reduction in grant aid to foreign firms and greater emphasis on building up strong indigenous firms. Since then, both indigenous and FDI enterprise development have been encouraged by policy, with the IDA Ireland and Enterprise Ireland catering for these firms today. The Culliton Review Group, which reported in 1992, along with other influences, saw the progressive shift from a narrow approach based on the provision of subsidies to firms and sectors towards an approach that emphasised the importance of the broader environment conducive to enterprise development. Ahead of the Curve: Ireland's Place in the Global Economy – by the Enterprise Strategy Group in 2004 – further developed the industrial organisation perspective to enterprise development by highlighting the need to support high value, knowledge-based activities in Ireland, emphasising the key roles of innovation and marketing/sales as well as core activities (manufacturing, services). That report also highlighted the importance of supporting SMEs and identified key drivers of successful enterprise development comprising cost-competitiveness, physical and communications infrastructure, innovation and entrepreneurship and management capacity.

The challenges of growing both indigenous and FDI employment are relevant to Meath in the context of this report and the essential conditions outlined in the 2004 report just mentioned are important to local firms as well as nationally.

Source: Consultancy team review.

3 Regional Policy Context

3.1 Introduction

As outlined in Section 2 (Figure 2.1, p. 19, and the discussion around that exhibit), the local authority reform process underway through Putting People First (2012) plans that regional structures and functions will be revised and strengthened with the replacement of the current eight regional authorities and two regional assemblies by three new regional assemblies to perform an updated range of strategic functions. Meath will be contained in the proposed Eastern-Midland Region, comprising the counties of Leinster apart from Carlow, Kilkenny and Wexford (which will make up the Southern Region along with the province of Munster).⁶⁶

3.2 Mid-East Regional Authority (MERA) Economic Development Action Plan

The Mid-East Economic Development Action Plan (2013) prepared by Maynooth University for MERA in March 2013 envisages three strategic goals for the Mid-East Region (comprising Counties Meath, Kildare and Wicklow) – entrepreneurship, connectivity and skills – and proceeds to outline each, taking account of key sectors and commenting on the role of marketing and spatial planning.⁶⁷

The latter strategic goal outlines the role that Meath will play in collaboration with Kildare and Wicklow to achieve the agreed economic priorities for the Mid-East Region and gives specific actions and indicative timescales in respect of implementation, including:

- New IDA/FDI plan for the Mid-East Region to be rolled out during 2014-2016;
- Marketing strategy for the Mid-East Region to be implemented in the same period; and
- Identification of key strategic sites within the Region during the period.

The MERA Action Plan includes a SWOT (strengths, weaknesses, opportunities and threats) of the Mid-East Region, where it mentions the following as opportunities (p. 8):

- “FDI – deploy appropriate ‘landbanks’ and skillsets to attract digital/healthcare, etc. activities”;
- “Promote reverse commuting, including advantages of ‘colocation’”;
- “Apply poly centric model of strong regional centres located on national transport corridors”;
- “Exploit proximity of developing urban centres to airports and ports with excellent transport infrastructure”.

The SWOT contained in the MERA Action Plan also includes the following item as a ‘threat’ to the Mid-East Region (p. 8):

- “Shortage of investment-ready land banks and services e.g. water and the lack of clarity on role of Irish Water”.

While the position in respect of Irish Water has advanced rapidly since the MERA Action Plan of March 2013, the issue of APBs or investment-ready buildings that can be kitted out to the needs of inward investment enterprises remains a challenge for Meath, and water may be an issue in respect of the county accommodating ‘big wet’ industry.

⁶⁶ The other new region will be Connacht-Ulster, comprising the province of Connacht and the three Ulster counties in the Republic of Ireland, namely Donegal, Monaghan and Cavan.

⁶⁷ Support for the MERA Economic Development Action Plan is signalled in the RPGs for the GDA 2010-2022 (p. 76), which we consider in more detail below.

3.3 Regional Planning Guidelines (RPGs) for the Greater Dublin Area (GDA)

Introduction

The RPGs for the GDA 2010-2022 were prepared by the Dublin Regional Authority and the Mid-East Regional Authority and published in June 2010.⁶⁸ Meath is therefore part of the RPGs, as outlined presently.

Vision for the GDA

The 'vision' outlined in the RPGs is as follows:

"The GDA by 2022 is an economically vibrant, active and sustainable international Gateway Region, with strong connectivity across the GDA Region, nationally and worldwide; a region which fosters communities living in attractive, accessible places well supported by community infrastructure and enjoying high quality leisure facilities; and promotes and protects across the GDA green corridors, active agricultural lands and protected natural areas".⁶⁹

In helping to realise the vision for the GDA, the RPGs outlined that the Dublin and Mid-East Regions will be attractive, vibrant locations for industry, commerce, recreation and tourism and will be a major focus for economic growth within the Country.

Regional Economic Strategy for the GDA

The Regional Economic Strategy for the GDA (to 2022) is outlined in Chapter 3 of the RPGs, where it is recognised that Ireland is largely a services economy and this is one of the key growth areas for the future, and needs to be supported through skills development, attractive environment, advanced broadband and high quality transport links. Niche manufacturing – particular mention is made of pharmaceuticals and food/drink – are also highlighted as a key economic activity and reference is also given to the growing pattern of convergence between different elements of manufacturing, including biopharma, nano-technologies, green technology and life sciences and the opportunities that such linkages offer. The building blocks of the Regional Economic Strategy are: leadership and governance; stimulating and supporting entrepreneurship; promoting innovation; skills and education; quality of life; connectivity; and utility investment.

Along with the manufacturing activities referred to, the main services activities in the GDA mentioned in the RPGs are ICT and financial services, which have grown very rapidly during 1998-2008.⁷⁰ While these activities are closely associated with Dublin, they are also seen as relevant to economic development in the main urban areas of Meath, owing to the availability of skills in those locations (where currently many commuters from the towns service the activities in Dublin but scope exists to retain greater impact closer to home).

⁶⁸ The document is available at <http://www.rpg.ie/documents/RPGPrintA4-SinglePages.pdf>. The first RPGs for the GDA were adopted in 2004 and set out a strategic framework for planning and development for the region up to 2016. The current RPGs update the previous ones and look forward to 2022.

⁶⁹ *Ibid.*, p. 2.

⁷⁰ *Ibid.*, Figure 5 (p. 47).

Spatial Dimension of the Regional Economic Strategy for the GDA

Settlement Hierarchy

The spatial dimension aims to support the growth of the ‘polycentric gateway’ (Dublin) and primary economic growth towns linked by multi-modal corridors and focused on identified core economic areas, which include the Navan Core Economic Area and Drogheda Core Economic Area plus secondary economic growth towns, which include the Ashbourne/Dunboyne Economic Area and Kells.

Table 3.1 below provides a tabular summary, put together by the consultancy team, of the settlement hierarchy in respect of County Meath provided for in the current RPGs for the GDA – the table has been compiled in an analogous fashion to the earlier table (Table 2.1, p. 24) showing the settlement hierarchy for Meath given in the NSS 2002-2020. Navan and Drogheda are each designated “Large Growth Town I” under the RPGs, meaning “Key destinations, economically active towns supporting surrounding areas, located on Multi Modal Corridor in metropolitan hinterland”.⁷¹ Dunboyne is classed as a “Large Growth Town II”, meaning “Smaller in scale but strong active growth towns, economically vibrant with high quality transport links to larger towns/city”.⁷² Dunboyne is also included in the Metropolitan Area of Meath and the RPGs recognise the economic potential of the town, given its proximity to the capital and its strategic location on the rail line. Next in the settlement hierarchy in the RPGs is the category “Moderate Sustainable Growth Town”, which includes Ashbourne, Dunshaughlin, Kells and Trim. Also shown in the table are Maynooth (like Dunboyne, designated as a Large Growth Town II) and Kilcock, which is designated in the same way as Ashbourne, Dunshaughlin, Kells and Trim (namely a Moderate Sustainable Growth Town). These settlements are of relevance here owing to the fact that they occur along the M4 Meath-Kildare corridor from Dublin.

Table 3.1: Hierarchy of County Meath Settlements in the RPGs for the GDA 2010-2022

Settlement	RPGs for the GDA 2010-2022 Settlement Hierarchy					
	Gateway Core	Met Con Town	Large Growth Town I	Large Growth Town II	Moderate Sustain Growth Town	Small Town
Navan			√			
Drogheda			√			
Ashbourne					√	
Kells					√	
Trim					√	
Dunboyne				√		
Dunshaughlin					√	
Maynooth				√		
Kilcock					√	

Source: RPGs for the GDA 2010-2022, consultancy team review/analysis.

Note: ‘Met Con Town’ denotes Metropolitan Consolidation Town (e.g. Swords, Lucan).

⁷¹ *Ibid.*, p. 5.

⁷² *Ibid.*

Key Urban Centres

The current RPGs for the GDA refer to Navan and Drogheda in respect of inter-regional issues, which are relevant to the Economic Development Strategy for Meath.

In regard to the opportunity presented by the M1 Corridor, the RPGs state:⁷³

“Recognising the potential and scale of the urban centres in Dundalk, Newry and Drogheda, there is a case for further strengthening the central portion of the Dublin-Belfast corridor in order to give that corridor greater economic integrity”.

“While Drogheda is an inherent part of the Border region its development is strongly influenced by its relative proximity to Dublin. In seeking to develop the potential future role of Drogheda, therefore, account must also be taken of:

- Drogheda’s relationship with its own catchment.
- Its role within the Border region.
- Its role as a port.
- Its role in the spatial development of the Greater Dublin Area having regard to the town’s close functional and physical links with the area”.

In Navan’s case, the RPGs state that:⁷⁴

“The future role of towns such as Navan, Naas and Wicklow needs to take account not just of their relationship with Dublin, but also their function in the development and servicing of their own catchment areas and their relationship with other adjoining regions. Achieving the objectives of the National Spatial Strategy for balanced regional development means developing new gateways and hubs at strategic locations in other regions. This has implications for decisions on the size and growth of towns in the Greater Dublin Area”.

This passage of the RPGs suggests to us a more proactive economic development role for Navan as an important urban centre in its own right, with greater economic impact retained in the immediate area.

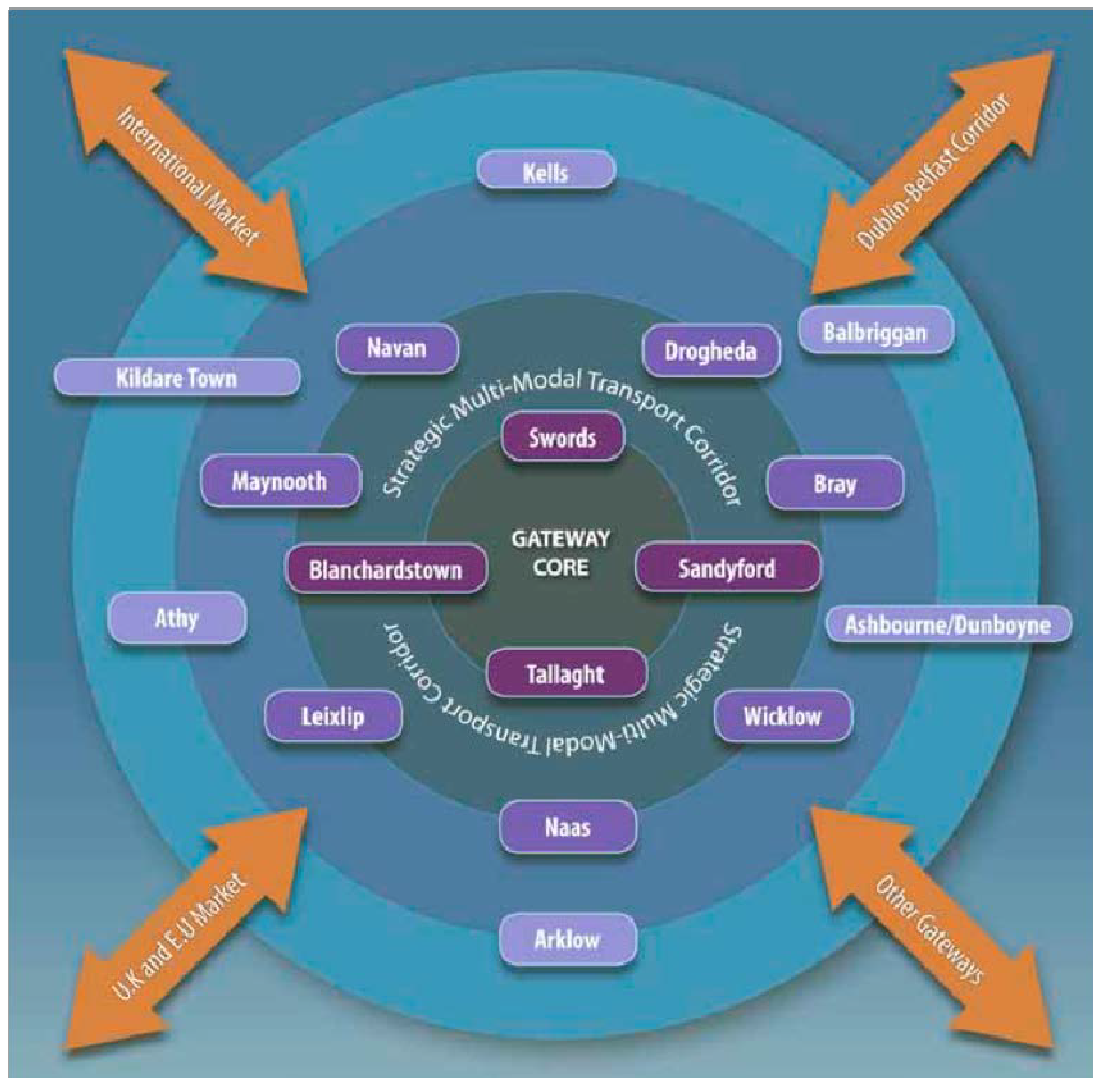
A conceptual map showing the key urban centres in the Regional Economic Strategy for the GDA contained in the RPGs is reproduced in Figure 3.1 below, where the spatial strategy has three parts:

- The continued development of the Gateway as an international focus for economic activity;
- Development of economic clusters, centred on strategic economic growth centres and supporting economic growth towns; and
- Focusing growth on the multi-modal transport corridors of the GDA, which connect the economic growth centres within the region, i.e. the Dublin City-region Gateway and beyond to other key towns and NSS gateways in adjoining regions, benefiting from national investment on these corridors.

⁷³ *Ibid.*, pp. 16-17.

⁷⁴ *Ibid.*, p. 17.

Figure 3.1: Conceptual Map of the Regional Economic Strategy for the GDA



Source: RPGs for the GDA 2010-2022 (Figure 9, p. 66).

Meath Primary Economic Growth Towns in the RPGs for the GDA 2010-2022

Navan (and Kells)

According to the Regional Economic Strategy in the RPGs for the GDA, Navan is described as having a:

“diverse employment profile with one of the largest employment sectors being the public service. Manufacturing, retail, health services construction and other service sectors also make an important contribution to employment, together with Tara Mines. Potential remains in developing and expanding business and technology such as manufacturing, international services and higher order retail in the town and its environs. Health and medical services together with the development of a digital economy also have potential as strong economic sectors in the region. The 100 acre IDA business park and [residential] SDZ at Clonmagadden provide opportunities to cater for future clustering activities. Collaboration and the building of strong relationships between [e]nterprise agencies and Meath County Council, to ensure targeted employment opportunities are suitably marketed, facilitated and developed, appropriate to relevant planning policy is strongly advocated”.⁷⁵

According to the RPGs, “[w]ithin the Navan core economic area, one of the supporting towns is Kells, also located on the same multi modal growth corridor. This settlement is identified in the RPGs as a secondary economic growth town and it is envisaged this town will provide a supporting and complimentary role to Navan. Potential exists to develop Kells as part of a tourism cluster and supporting the service and manufacturing role of the County Town and northwest region of the county”.⁷⁶

On the possibility of a NE regional hospital for Navan, the RPGs for the GDA refer to the North East Regional Hospital Location Study 2008 (commissioned by the HSE) and state that:⁷⁷

“Local level planning should address facilitating the delivery of this type of project. Close consultation between the HSE and Planning Authorities in the development management process ... is also supported”.

Drogheda

The Drogheda Core Economic Area is described in the following terms in the RPGs for the GDA:⁷⁸

“Drogheda, one of the largest towns in Ireland, is a designated primary growth centre within national and regional spatial policy. Locational advantages include multi regional location, proximity to coast and ports and position along [the] M1 Belfast to Dublin Economic Corridor. Though primarily located within the Border Region, the settlement extends into parts of Meath and has a notable economic sphere of influence within the GDA in terms of service provisions and attracting labour supply from areas such as Meath, Louth and Northern Ireland. Wholesale and retail trade, together with health and manufacturing have been prominent employment sectors in the town (Lourdes Hospital is a large employment sector in Drogheda and a number of individual firms also make a significant contribution to employment in the areas of food processing, beverages and medical instrument production). In recent years the retail base offer has been expanded, consequent of developments such as Scotch Hall”.

⁷⁵ *Ibid.*, Box 5, p. 71.

⁷⁶ *Ibid.*

⁷⁷ *Ibid.*, p. 174.

⁷⁸ *Ibid.*, Box 6, p. 71.

Furthermore, according to the RPGs:⁷⁹

“IDA supported businesses, in a number of business parks located on the edge of the settlement[,] are key elements. Continued growth and employment opportunities for the town and its environs, availing of its multi-modal transport connections, as befitting its primary economic growth centre status, is desirable in order to strengthen the opportunities and benefits to the GDA of the E1 International economic corridor from Drogheda, through Meath, Fingal and to Dublin City and Wicklow. The development and diversification of existing traditional employment sectors, together with taking advantage of the growing pattern of convergence and clustering, provide sectoral opportunities in the areas of high value added employment manufacturing and traded services. Higher order retail is also a strength for this core economic area. Building upon the historic settlement patterns and heritage of the area could also be used as part of a branding exercise for the area as part of developing the tourism sector”.

Meath Secondary Economic Growth Towns in the GDA RPGs 2010-2022

Ashbourne/Dunboyne

Ashbourne is the second largest town in County Meath and has experienced significant economic growth since the 2004 RPGs. This has included the construction of a new town centre scheme comprising both office and significant retail floorspace, the expansion of the Ashbourne Industrial Estate and development of Ashbourne Business Park. Growth in the town has undoubtedly been influenced by proximity to the Metropolitan Area of Dublin and Dublin Airport (although Ashbourne is not part of the Metropolitan Area of Meath). This move towards more holistic and sustainable development is illustrative of the transitioning of Ashbourne away from a dormitory hinterland context towards a more urbanised, metropolitan character.

As a Moderate Sustainable Growth Town in the settlement hierarchy of the GDA, Ashbourne has an important role in service provision for its large catchment. It is thus expected (in the RPGs for the GDA) that enterprise and employment will continue to expand to meet the requirements of the population of the town and adjoining areas. The base conditions for a strong enterprise sector are present in Ashbourne and developments in recent years are illustrative of the entrepreneurial spirit in the town. In the short term, existing businesses should be supported and opportunities to further expand economic development in the town should be fostered. In particular, according to the RPGs:⁸⁰

“Ashbourne’s location in proximity to the metropolitan area of the city and Dublin [A]irport and its high quality transport links should be capitalised upon in attracting new industry. The future development of the adjoining settlement of Ratoath will be linked to that of Ashbourne and Dunshaughlin and should aim to capitalise on the synergy with those settlements. In particular, Ratoath has a large, well educated commuter labour force which is a valuable resource for future local economic development in a sustainable manner. It is important that Ratoath should become more self sustaining in terms of providing employment opportunities locally. Therefore, sustainable higher end economic investment opportunities consistent with the size of the town should be supported”.

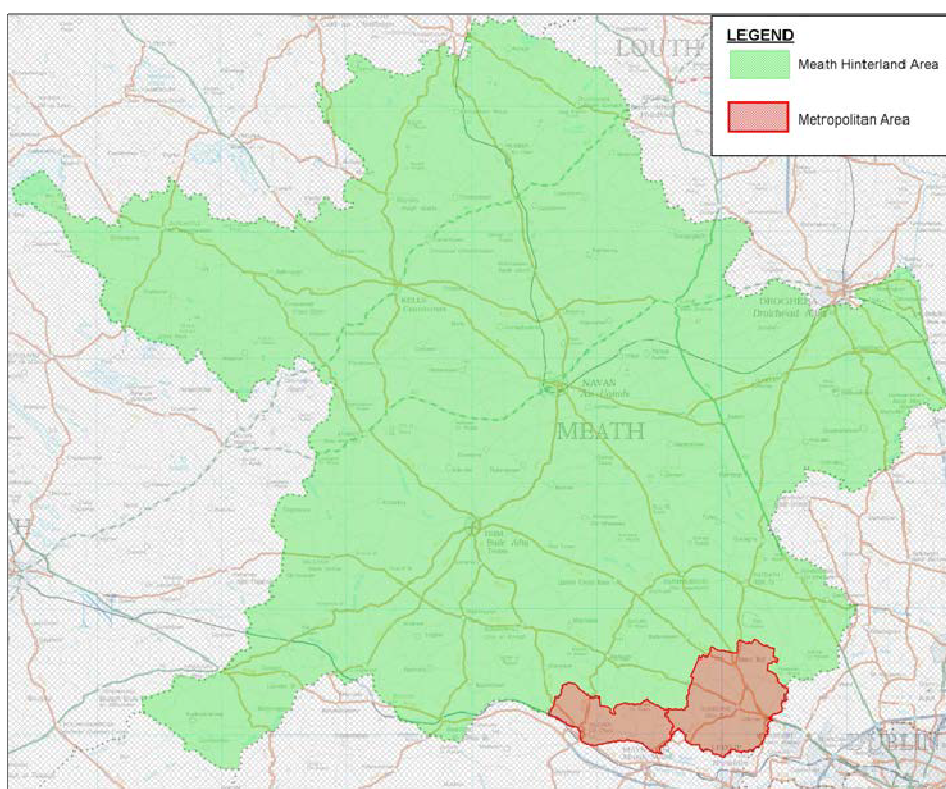
⁷⁹ *Ibid.*

⁸⁰ *Ibid.*, p. 74.

“Dunboyne, a large growth town II in the metropolitan area, has yet to realise its long term potential but plays an important role in this economic growth area given its status and location on a developing rail line. It is also located strategically on the edge of the Gateway Core in an area with a high FDI presence. The designation of Dunboyne within the GDA retail hierarchy illustrates the economic potential of the town over a designated time span. This economic growth area experiences high levels of outward commuting patterns to the Dublin area, and it is important that economic stimuli measures are underpinned by necessary infrastructure investment, particularly in relation to water and waste water services”.

The map presented in Figure 3.2 below illustrates the delineation of the Metropolitan and Hinterland parts of County Meath as provided for in the RPGs for the GDA 2010-2022. The small delineated area to the south-east of the map includes Dunboyne, but not the Moderate Sustainable Growth Towns referred to in the passage above, namely Ashbourne, Rataoth and Dunshaughlin.

Figure 3.2: Map of the Meath Hinterland and Metropolitan Areas in the RPGs for the GDA 2010-2022



Source: RPGs for the GDA 2010-2022, Meath County Council.

Note: This map also appears in the Meath CDP 2013-2019 (Volume 1, Figure 3.3, p. 59).

3.4 Retail Planning Guidelines for the Greater Dublin Area (GDA)

Retail Hierarchy

The RPGs for the GDA 2010-2022 are reflective of the Retail Planning Guidelines for the GDA 2008-2016.⁸¹ On the basis of the settlement hierarchy that is central to both documents, the Retail Planning Guidelines provide for a 'retail hierarchy', which includes, after Dublin City Centre as a 'Level 1 Metropolitan Centre', Navan as a 'Level 2 Major Town Centre and County Town', followed by Ashbourne, Dunboyne, Dunshaughlin, Kells, Trim, Laytown/Bettystown and Enfield as 'Level 3 Sub-County Towns'.

Retailing in Navan

The Retail Planning Guidelines for the GDA 2008-2016 recognise the importance of addressing traffic congestion Navan. Since the publication of the Retail Planning Guidelines, considerable progress has been made in this regard, with the completion of the M3 Motorway in 2010.

A key issue identified for Navan in the Retail Planning Guidelines concerns the competitiveness of the retail environment within the town:⁸²

"A number of towns across the GDA both in the metropolitan area such as Dún Laoghaire and Bray and the hinterland such as Navan and Wicklow have traditional high streets which are no longer strongly competitive and do not attract top line retailers because of the poor retail environment, uncompetitive tenant mix and principally inadequate space. There is a need for maintaining a strong focus on creating opportunities to make these more attractive destinations for shoppers and for new retail offer to be facilitated and strong policies are needed to direct new and improved floorspace to these towns".

The actions for Meath County Council in the Retail Planning Guidelines for the GDA are as follows:⁸³

"...flexibility in bringing forward key sites within the town core area. It will also necessitate encouragement of the provision of high quality retail units to provide for the needs of modern retailers and to facilitate the provision of a good mix of offer to the local and surrounding population".

"The promotion of policies to take advantage of the potential of Navan town centre for greater intensification of development within the existing fabric and on opportunity sites and through the redevelopment of the central car parking areas. This will ensure that retail and other town centre uses are retained within the town centre rather than dissipated to more peripheral areas, thus avoiding the possibility of displacement of the prime shopping focus from the existing core retail area".

"To facilitate and promote the continued improvement of Dunboyne, Ashbourne, Dunshaughlin, Kells, Laytown/Bettystown, Enfield and Trim in line with their position in the hierarchy so that they meet their role as Level 3 centres, incorporating a range of convenience and comparison retail facilities adequate to serve the everyday needs of the catchment population. To provide for the future development of Dunboyne from Level 3 to a Level 2 centre over a 15-20 year time

⁸¹ The Retail Planning Guidelines (in three parts) are available at <http://www.rpg.ie/retail-strategy.html>. Various other underlying documents and reports supporting the guidelines/strategy are also available at the link.

⁸² <http://www.rpg.ie/documents/RetailStrategyEnglishParts3-4.pdf> (paragraph 4.35, p. 29).

⁸³ <http://www.rpg.ie/documents/RetailStrategyEnglishParts5-6.pdf> (p. 78).

frame alongside the development of the rail line and associated future population growth, with this growth guided by the the Integrated Framework Plan for Landuse and Transportation Plan and the Local Area Plan for Dunboyne”.

3.5 Gateways and Hubs Development Index 2012: A Review of Socio-Economic Performance

The purpose of this report for the two regional assemblies – the Border Midland and Western (BMW) Regional Assembly and the Southern and Eastern (SE) Regional Assembly – was to populate the NSS Gateways and Hubs Development Index (2012), which had been originally developed in 2009.⁸⁴

In respect of Dublin, between 2006 and 2011, there was a 7% increase in third-level educational attainment among the workforce, an almost 9% increase in population and a 42% increase in broadband connectivity. There was a drop in the index core for Dublin between the two years, from 5.6 in 2009 to 5.4 in 2012.

In regard to the Dundalk Gateway, during 2006-2011, the review report observed a 7% increase in third-level educational attainment among the workforce, a 10% increase in population and an over 44% increase in broadband connectivity. There was a small increase in the score for Dundalk between 2009 and 2012, from 4.5 to 4.6.

The consultancy team would be reluctant to read too much into the index or this report for a variety of reasons, including the absence/paucity of information on FDI and the attempt of the methodology to seek to pull together disparate socio-economic data in a complex manner that may not reflect economic performance fundamentally. In addition, the period in which the report pertains (2006-2011) was one of substantial recession in Ireland (post-2007) and it comes as little surprise that certain indicators (e.g. company starts) were down between 2009 and 2010 in many instances.

3.6 Regional Indicators Report 2014

This report – subtitled Monitoring Framework for Implementation of the Regional Planning Guidelines – was produced by the DECLG on behalf of the eight regional authorities.⁸⁵ It covers three strategic themes – ‘Economic Prosperity’, ‘People and Places’ and ‘Environment and Infrastructure’ – within which there are various evidence-based indicators (at regional authority level).

While the economic data contained in this report are pitched at the level of the regional authority as opposed to the county, the information conveyed is nevertheless relevant to the Economic Development Strategy for Meath because it illustrates the fact that the county is favourably located within the most economically dynamic region of the county, in terms of employment, enterprise development, educational attainment etc.

FDI

In terms of specific economic performance metrics, the report makes some noteworthy observations. In regard to FDI, the report observes that (our italics):

“When the number of IDA Companies is measured against the population of each region, the Mid-West, Dublin and South-West have a comparatively higher proportion of IDA Companies per population when compared to other regions. *There is a clear pattern emerging in that new*

⁸⁴ The 2012 report is available at http://cua.ie/gorm/publications/PS_Summary_report.pdf.

⁸⁵ http://www.rpg.ie/documents/Regional_Indicators_Report_2014.pdf.

FDI companies gravitate towards existing companies already established in Ireland. The clustering effect is, therefore, obvious”.⁸⁶

On the outlook and prospects for FDI in the coming years, the report states:⁸⁷

“FDI is vital to the future of the Irish economy. It is obvious from the data that the distribution of FDI is not uniform across the country and that there is a clustering effect around the main cities of Dublin, Cork, Galway and Limerick. This trend is a challenge for the other regions in how they must adapt to either compete or complement the other regions”.

“The IDA will focus on winning new investments, particularly from the following sectors:

- Life sciences
- Pharma and biopharma
- Medical devices
- Information & communications technology
- Financial services
- Content industry, consumer and business services
- Diversified industries and engineering
- Clean technologies”.

“All regions must, therefore, strive to become competitive and create the right environment and conditions to attract FDI. Given the importance of the nature, scale and type of employment offered by IDA Companies, it is increasingly obvious that their contribution to regions is significant and, therefore, vital to their future prosperity”.

Gross Value Added (GVA)

In terms of GVA – a measure of value added – the Regional Indicators Report 2014 highlights the importance of the Dublin and South-West Regions but at the same time notes the role of the commuters in respect of these counties:

“It is no coincidence that the two regions which over-performed relative to the state average for GVA per person were the Dublin Region and the South-West Region ... It is also an indication of the economic strength of the two main Irish cities when compared with the other regions and highlights the importance of cities at a national level”.⁸⁸

“However, when looking at the GVA for the Midland and Mid-East Regions, it is important to note that 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. Since large numbers of people from these regions commute to Dublin for work, the GVA produced by these people is attributed to the Dublin Region rather than to the Midland and Mid-East Regions”.⁸⁹

⁸⁶ *Ibid.*, p. 14.

⁸⁷ *Ibid.*, p. 15.

⁸⁸ *Ibid.*, p. 21.

⁸⁹ *Ibid.*, p. 22.

Tertiary Education

The Regional Indicators Report 2014 also notes that tertiary education is a key prerequisite in building a globally competitive, knowledge economy in accordance with national policy and that those populations with higher tertiary educational have greater capacity to support higher levels of economic activity and thus benefit with higher levels of earnings.

While the report notes that all eight regions have exceeded the Europe 2020 targets for third-level education, subsequently in this report it is shown that tertiary education within Meath is lower compared with other parts of the Mid-East and with the GDA, and the State as a whole. However, we do not believe that this is grounds for serious concern because we envisage that third-level educational attainment will improve in Meath (with economic development) and the comparably high tertiary educational performance of the county's outbound commuters also needs to be factored-in, which we do subsequently in the report.

4 Local Policy Context

4.1 Meath County Development Plan (CDP) 2013-2019 (As Varied)

The Meath CDP 2013-2019 contains the current economic development strategy for County Meath. It is intended that the Economic Development Strategy under consideration in this report will be inserted as a variation to the CDP. Since the current CDP was adopted in December 2012, and came into effect on January 2013, two variations on the CDP have been made. These are considered presently.

Development Plan Vision and Core Principles

The vision for Meath outlined in the CDP 2013-2019 is stated in the Core Strategy of Volume 1 of the CDP (p. 11):

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

The vision is supplemented by a series of core principles, including the following with an economic dimension (directly or indirectly) (pp. 11-12):⁹⁰

- “Core Principle 1 – To develop Meath’s critical role in the Dublin and Mid East Region and its role as part of the Dublin City National Economic Gateway maximising on its proximity to Dublin Airport”;
- “Core Principle 3 – To promote sustainable economic development to support the population of County Meath”;
- “Core Principle 6 – To support the creation of a compact urban form in all settlements in Meath”;
- “Core Principle 7 – To support agriculture and agricultural related development in Meath and strengthen the county as a hub for the vibrant agricultural and food sectors”;
- “Core Principle 9 – To consolidate population growth and employment in areas best served by public transport and a range of transport modes”;
- “Core Principle 10 – To promote and support the integration of land use and transport and a modal shift to greater use of sustainable modes of transport, including public transport, walking and cycling”.

Settlement and Economic Hierarchy

The settlement hierarchy provided for in the CDP 2013-2019 is consistent with the RPGs for the GDA 2010-2022 and is presented in Table 4.1 below.⁹¹

The settlement hierarchy is especially important to Meath, owing to the fact that many of its smaller settlements have grown very rapidly over the past decade, as commuter areas, and this has put pressure on local services and communities from a sustainable development perspective.

⁹⁰ The Core Strategy of the CDP (Chapter 2) contains 12 core principles.

⁹¹ The settlement hierarchy in the Meath CDP also identifies the following ‘Villages’: Ballivor, Carlanstown, Carnaross, Clonard, Clonee, Crossakiel, Donore, Drumconrath, Gibbstown, Gormonston, Julianstown, Kentstown, Kilbride, Kildalkey, Kilmainhamwood, Kilmessan, Longwood, Mornington/Donacorney, Moynalty, Nobber, Rathcairn, Rathmolyon, Slane, Summerhill.

Table 4.1: Hierarchy of County Meath Settlements in the Meath CDP 2013-2019

Settlement	Meath CDP 2013-2019 Settlement Hierarchy			
	Large Growth Town I	Large Growth Town II	Moderate Sustain Growth Town	Small Town
Navan	√			
Drogheda	√			
Ashbourne			√	
Kells			√	
Trim			√	
Duleek				√
Dunboyne		√		
Dunshaughlin				√
Laytown/Bettystown/Mornington				√
Athboy				√
Enfield				√
Oldcastle				√
Rataoth				√
Maynooth		√		
Kilcock			√	
Stamullan/Gormonstown				√

Source: Meath CDP 2013-2019 (Volume 1), consultancy team review/analysis.

Note: 'Drogheda' means the Drogheda environs in Meath and similarly for Maynooth and Kilcock. In regard to Dunshaughlin, the Meath CDP 2013-2019 (p. 13) states that "Dunshaughlin will become a 'Moderate Sustainable Growth Town following the granting of permission of a railway order for the Navan Rail Line Phase II, including a station at Dunshaughlin'".

The consistency of the settlement hierarchy in the Meath CDP 2013-2019 with the RPGs for the GDA 2010-2022, and the NSS 2002-2020, is illustrated in Table 4.2 overleaf, which the consultancy team has put together.

Table 4.2: Hierarchy of County Meath Settlements in the Meath CDP 2013-2019, RPGs for the GDA 2010-2022 and the NSS 2002-2020

Settlement	Settlement Hierarchy																	
	National Spatial Strategy (NSS) 2002-2020								RPGs for the GDA 2010-2022						Meath CDP 2013-2019			
	Gateway	Hub	County Town	Primary Dev Centre	<5,000 Town	1,500-5,000 Town	Urban Strength Opp	Urban Centres (circa 1,000)	Gateway Core	Met Con Town	Large Growth Town I	Large Growth Town II	Moderate Sustain Growth Town	Small Town	Large Growth Town I	Large Growth Town II	Moderate Sustain Growth Town	Small Town
Navan			✓	✓							✓				✓			
Drogheda				✓							✓				✓			
Ashbourne					✓								✓				✓	
Kells Trim						✓	✓						✓				✓	
Duleek						✓	✓						✓				✓	
Dunboyne						✓												✓
Dunshaughlin						✓						✓				✓		
Laytown/Bettystown/Mornington						✓							✓				✓	
						✓												✓
Alnboy								✓										✓
Enfield								✓										✓
Oldcastle								✓										✓
Rataon								✓										✓
Maynooth Kilcock												✓				✓		
Slamullan/Gormonstown												✓					✓	✓

Source and notes: Please refer to earlier Table 2.1(p. 24), Table 3.1 (p. 49) and Table 4.1 (p. 60).

As the County Town and the only Large Growth Town I located entirely in Meath, the CDP highlights the importance of Navan attaining critical mass to attract investment and industry. Navan is therefore identified as the primary growth centre in the county, planned to cater for a population of up to 50,000.

Drogheda (environs of Meath) is also designated as a Large Growth Town I in the settlement hierarchy and is of significance for lying on the M1 Corridor linking the two largest cities on the island. As mentioned earlier in our discussion of FDI, the IDA Business and Technology Park on the Donore Road occurs in the Drogheda environs covered by the Meath CDP and, along with its counterpart in Navan, is the only such facility for FDI in the county. IDA Ireland completed the park in Drogheda in 2006, including the construction of the first office building of approximately 23,000 sq. ft. on the park in the same year. This office is today occupied by IFS State Street, which operates a funds administration business (i.e. internationally-traded services), with over 200 employees. Since then, however, there have been no further buildings or tenants in the park. Nevertheless, the Donore Road facility in Drogheda has economic development potential, not least owing to the quantum of skills, transport infrastructure and favourable location in the locality.

The CDP also recognises that it is necessary to direct development into the Metropolitan Area of Meath to promote consolidation of development at locations proximate to the City Gateway and close to services and facilities. As a Large Growth Town II directly served by new public transport infrastructure, Dunboyne will be the focus for the Metropolitan Area of the county (Figure 3.2, p. 54, illustrates the Metropolitan and Hinterland Areas of Meath).

The Core Strategy Map for Meath provided for in the CDP is reproduced in Figure 4.1 overleaf and identifies the priority areas for economic development in the coming years.

- Navan Core Economic Area, with Navan as a Primary Economic Growth Town and including the Secondary Economic Growth Town of Kells and the town of Trim;
- Drogheda Core Economic Area, encompassing the M1 Dublin-Belfast Corridor;
- Secondary Economic Growth Towns of Ashbourne and Dunboyne (the latter in the Metropolitan Area of Meath); and
- The Environs of Maynooth and Kilcock located in the administrative area of Meath (in addition to Dunboyne/Pace and Clonee) are included in the Gateway Core Economic Area (Maynooth and Leixlip are identified as a Core Economic Area with the towns of Kilcock and Celbridge providing a supporting role).

Employment Land Use Categories

Three employment land use categories are provided for in the Meath CDP 2013-2019 (Table 2.8, p. 38):

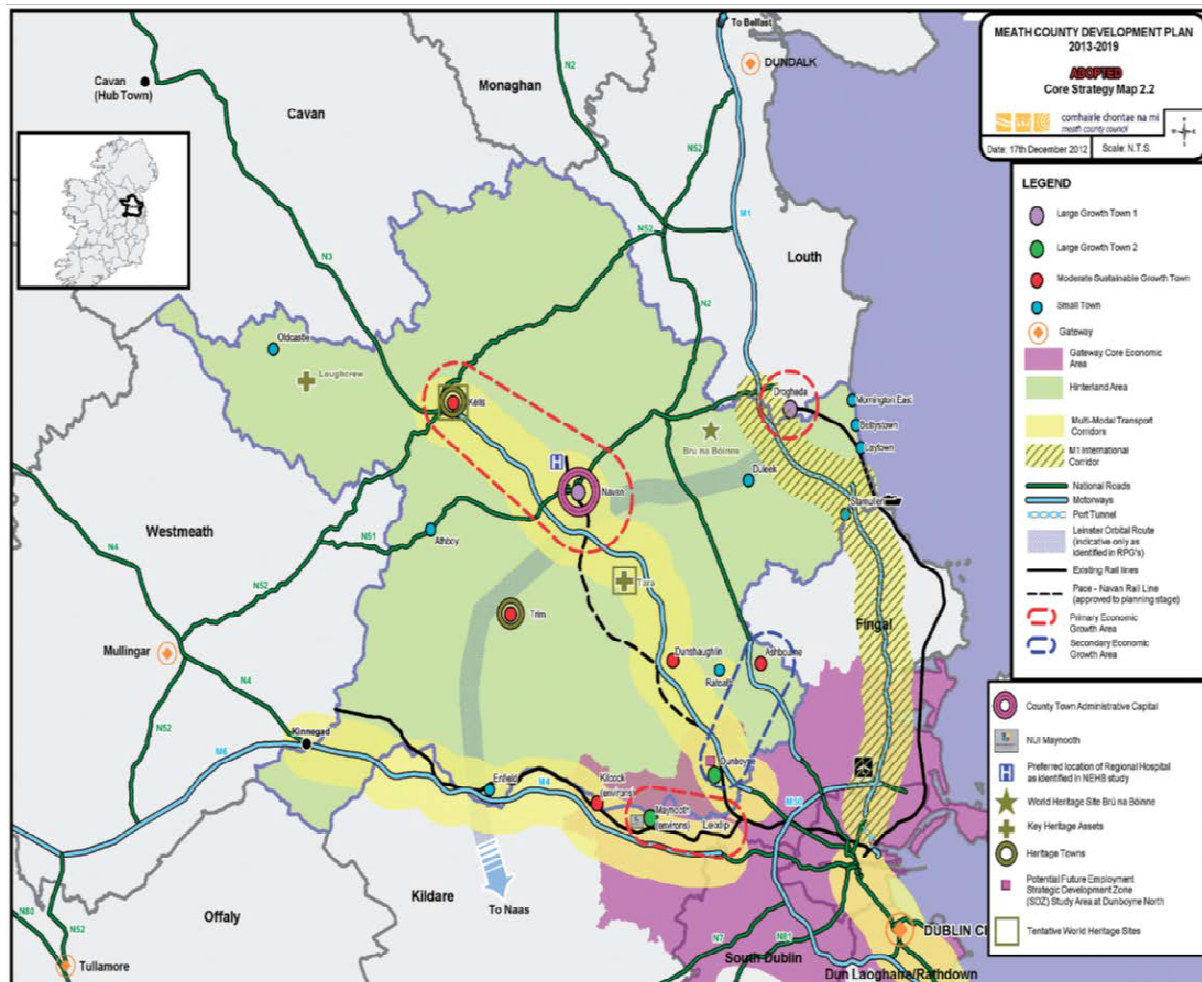
- “E1 Strategic Employment Zones (High Technology Uses) – To facilitate opportunities for high technology and major campus style office based employment within high quality and accessible locations”;
- “E2 General Enterprise & Employment – To provide for the creation of enterprise and facilitate opportunities for employment through industrial, manufacturing, distribution, warehousing and other general employment / enterprise uses in a good quality physical environment”;
- “E3 Warehousing & Distribution – To facilitate logistics, warehousing, distribution and supply chain management inclusive of related industry facilities which require good access to the major road network”.

In broad terms, the E1 land use zoning objective envisages the accommodation of ‘people’-based economic development (including services) and the E2 and E3 objectives are designed to accommodate ‘product’-based economic development (including manufacturing and related activities).

Subsequently in Section 8 of this report, we engage in a detailed identification and assessment of employment development sites around the county, in the context of the E1-E3 zoning objectives and mindful of the hierarchy of economic centres and targeted sectors in each case outlined in Chapter 4 of the CDP. The analysis of the sites is organised around the major transport corridors traversing County Meath, which is a unique characteristic of the county, namely:

- The M1 Corridor, which includes Drogheda Environs, Stamullan, Gormanstown;
- The M2 Corridor, including Ashbourne;
- The M3 Corridor, which includes Dunboyne/Pace/Clonee within the GDA Metropolitan Area of Meath and, further north, Navan and Kells;
- The M4 Corridor, including Maynooth Environs and Enfield.

Figure 4.1: Core Strategy Map of Meath in the Meath CDP 2013-2019



Source: Meath CDP 2013-2019 (Volume 1, Core Strategy Map 2.2).

Variations to the Meath CDP 2013-2019

Two variations to the CDP have been made since it came into effect in January 2013.

Variation No. 1, which was adopted in November 2013, relates to the making of LAPs (local area plans) to ensure consistency with the CDP (as varied), including the prioritised settlement areas in the CDP, which are considered in more detail subsequently in Section 8 (which outlines the Economic Vision for Meath, with the assessment of the sites a key aspect of this part of the report) and Section 9, which presents the Spatial Actions of the plan-led Economic Development Strategy.

Variation No. 2 was made in May 2014 and gives effect to the Core Strategy of the CDP and, in particular, to objectives CS OBJ 2, 3 and 5 and also to objective ED OBJ 2 contained in the Economic Strategy of the CDP. Variation No. 2 includes provision for the release of residential and employment lands for 5 of the 6 centres which will retain their LAPs, namely Ashbourne, Drogheda (Southern Environs), Dunboyne/Clonee/Pace, Dunshaughlin and Ratoath.⁹²

4.2 Meath County Retail Strategy 2013-2019

The Meath County Retail Strategy 2013-2019 appears as Appendix 5 of the Meath County Development Plan 2013-2019 and is summarised within Chapter 4 of Volume 1 of the CDP.

The Retail Strategy aims to sustain and improve the retail competitiveness of the county, address retail expenditure leakage and ensure an equitable, efficient and sustainable spatial distribution of retail floorspace across the county. The emphasis of the Retail Strategy is on ensuring that the county sustains its role and importance in the shopping patterns of local people, the region and nationally. This should be largely driven by the continuing improvement of Meath's 'comparison shopping' offering particularly in its main centres.⁹³

The Retail Strategy for Meath reflects the Retail Planning Guidelines for the GDA 2008-2016.⁹⁴ In particular, Table 4.3 of the Meath CDP 2013-2019 sets out the 'retail hierarchy' for the county, which reflects that of the GDA document, with Navan as a 'Major Town Centre and County Town Centre', followed by Ashbourne, Dunboyne, Dunshaughlin, Kells, Trim, Laytown/Bettystown and Enfield as 'Town And/Or District Centres and Sub County Town Centres'. Drogheda Environs is classed under 'Other', reflecting the fact that the majority of the retail offering of Drogheda is located in County Louth.

The specific objectives of the Retail Strategy for Meath together aim to ensure the continued vitality and viability of town centres, and comprise the following:

- Facilitate the identification, promotion and development of key town centre opportunity sites;
- Promote the revitalisation of vacant and derelict properties/shop units;
- Encourage infill development and the redevelopment of derelict and obsolete sites;
- Promote ongoing environmental improvements to the public realm;
- Prevent over-development of particular non-retail uses such as takeaways in core retail areas;
- Promote activities including festivals, events, street markets and farmer's/country markets in each town.

⁹² The other settlement area/centre (i.e. the sixth) that will retain its LAP is Laytown/Bettystown/Mornington East/Mornington/Donacorney, lying in the eastern part of the county.

⁹³ Comparison shopping generally refers to the practice of comparing the price of goods or services provided by different shops or companies before making a purchase.

⁹⁴ *Supra* footnote 81.

4.3 Meath Tourism

Visitor Attractions

One of the brands of Meath is 'The Heritage Capital of Ireland', in recognition of its importance in Irish history. The county has one of Europe's best collections of prehistoric sites and monuments, and a unique blend of history and culture. As a result, Meath has a large number of visitor attractions, the most famous being the UNESCO World Heritage Site of Brú na Bóinne incorporating the passage tombs at Newgrange, Knowth and Dowth. The Battle of the Boyne site (now incorporating Oldbridge House and Estate), Trim Castle and the Hill of Tara also have a high profile in both the domestic and overseas markets. Loughcrew, the Royal site of Tara, Tailteann, the Hill of Ward, Christian sites at Kells, Slane, Donaghmore, Killeen, Dunsany and Duleek, monastic ruins at Bective and Trim, grand country houses from the 18th Century onwards and associated prestigious gardens throughout the county all bear testimony to Meath's rich historic past and the county's inexhaustive list of attractions.

The Meath CDP 2013-2019 observes that visitors attracted by outdoor pursuits are well catered for with options such as:

- 16 golf courses, including Killeen Castle, which hosted the 2011 Solheim Cup, and Knightsbrook (Trim), which hosted the 2011 Junior Solheim Cup event;
- Four race courses – Fairyhouse, Navan, Bellewstown and Laytown Strand;
- A large number of approved equestrian centres;
- Heritage walking routes – Kells Girley Bog Eco Walk, Boyne Ramparts Heritage Walk and Trim Castle River Walk;
- Forest Walks such as Loughcrew Gardens and Mullaghmeen Forest (Oldcastle), Littlewood Forest (Slane), Balrath Wood (Kentstown), and Dalgan Park (Navan);
- Historic Town Walks in Trim, Slane, Kells, Navan and Gormonston/Stamullen with Heritage Trails in Athboy, Duleek, Dunshaughlin and Moynalty (winner of the national Tidy Towns competition in 2013);
- Anglers can fish the Boyne and its tributaries for wild brown trout and Atlantic salmon whilst coarse angling is facilitated in the Royal Canal (Enfield), Lough Sheelin and the North Meath lakes with sea angling along the coast;
- Swimming, walking and kiting along the 10 kilometre (km) coastline.

Additional Visitor Attractions Underway or Envisaged

It is generally recognised in tourism development that a location can never have enough visitor attractions and it is therefore important to renew a location's stock of attractions through new additions and/or development/improvement of existing ones. This is important for repeat visitors as well as new visitors, and a large and varied number of visitor attractions are important to ensuring a location's appeal to different segments of the market, for example business, leisure, family etc.

Undoubtedly one of the most successful of Meath's visitor attractions in recent years is Tayto Park, located just north of Ashbourne off the N2 primary road and therefore ideally located in respect of Dublin as well as elsewhere in Meath. With well over 400,000 visitors in 2013, the facility has grown very rapidly to rank among the very largest visitor attractions in the country. The facility is therefore important for the local economies in Ashbourne and Rataoth, and that of Meath more widely, and the consultancy team has learned in its consultations that there are plans to expand the facility and to provide a tourist information service in Ashbourne (reflecting the extent of growth of the attraction), which would aim to inform visitors about other local attractions in Meath as well as Tayto Park.

Various other initiatives are underway or envisaged around the county. For example, EU INTERREG IVA funding has been granted for a proposed marina/pontoon facility on the Boyne in the centre of Drogheda, which, it is planned, would attract pleasure craft and tie-in with the visitor developments at the Battle of the Boyne site at nearby Oldbridge House. Earlier this year, a walkway between St. Dominic's Park in Drogheda to Oldbridge House was completed, allowing pedestrian and cyclist access between the town centre and the historic visitor facility in a safe and scenic manner along the banks of the river, and it is planned to continue the route that would allow one to walk from Drogheda to Navan (*via Slane*) (with the route following the river). Plans are also under consideration in regard to a possible 'Boyneside Trail' linking Drogheda with the village of Mornington and Bettystown Beach by developing a 6.8km long greenway between the Drogheda (McBride) Railway Station on the eastern outskirts of Drogheda Town and Mornington located on the Meath coast. When completed, it is envisaged that the project would be a flagship scheme for tourism and be a model for recreational cycling in Ireland. It could also be a paradigm of how a sustainable transport network can be built and integrated into a national cycle network, public transport, heritage sites, employment centres and local amenities. It would also serve to connect Mornington and coastal Meath to Oldbridge House for pedestrians, runners and cyclists.

Infrastructure Supporting Meath's Tourism Offering

As observed in the Meath CDP (as varied), the expansion of the tourism sector in Meath is positively influenced by the following:

- The wealth of the county's cultural and natural heritage;
- The range of activities catering for outdoor pursuits;
- The county's accessibility and proximity to the national Gateway (the primary access point to the country and home to the largest domestic market).

Another very important factor is the fact that Fáilte Ireland has designated the Boyne Valley, which traverses and impacts the whole of the county, as one of Ireland's 'signature' destinations. Another key factor is the co-working between Meath and Louth County Councils in respect of the management and promotion of the resource, which is to be welcomed.

The Meath CDP mentions that figures collated by Fáilte Ireland outline that 135,000 overseas visitors came to Meath in 2010, with more than half from Britain and approximately a quarter from mainland Europe and from North America respectively. The overseas revenue was estimated at €54 million. It is estimated that an additional 126,000 domestic visitors also visited the county. The UNESCO World Heritage Site of Brú na Bóinne Visitor Centre was the top visitor attraction in the East & Midlands Region with 209,270 visitors followed by Trim Castle which attracted 59,416 visitors and the Battle of the Boyne Site which followed with 40,334 visitors.⁹⁵

The Strategic Plan for Tourism in Meath 2011-2013 recommends that Meath Tourism, which operates under the auspices of Meath County Council, channels its focus of activity into two main areas to make a national and international impact:

- *Heritage and culture tourism* as Ireland's Heritage Capital – with regard to the Boyne Valley offering; and

⁹⁵ More recent figures (for 2012) are given in our outline of tourism in Section 8, which allows presents figures on the growth of the county's visitor attractions, including the especially rapid growth of Tayto Park.

- *Business tourism* – using the ‘Meet in Meath’ brand as a communication vehicle which ties into ‘Meet in Ireland’ business proposition. ‘Meet in Meath’ is acknowledged as the ‘business tourism’ arm of Meath Tourism.

As well as working with Louth County Council in respect of the Boyne Valley offering, and local stakeholders to support both arms of the county’s tourism proposition, it is also recommended in the CDP that Meath County Council works in partnership with Meath Partnership (LEADER company) to encourage and help promote various tourism and visitor initiatives on the ground across the county.

Accommodation

Like visitor attractions, successful tourist destinations also tend to have a range of accommodation types, including hotel, high quality bed-and-breakfast (B&B), holiday homes and caravan/camping sites (provided they do not impinge on the local landscape).

The economic development policies ED POL 35-42 are all relevant to ensuring attractive and varied accommodation in Meath in anticipation of increased visitor numbers to the county in the coming years, as the economic recovery gains momentum (domestic and international markets) and as the county’s profile gains further promotion through the tourism agencies (international markets).⁹⁶

4.4 Local Planning Policies

Noting the intention of Variation No. 2 of the Meath CDP 2013-2019 to simplify the planning process in respect of economic development – through an appreciable reduction in the number of LAPs – it will be important in the period covered by the Economic Development Strategy for Meath (i.e. 2014-2022) to ensure that sufficient and suitable land is zoned for employment generating uses through the individual town development and local area plan process and in the preparation of development and zoning objectives for towns/villages with no individual land use plan that will be included in the County Development Plan, as appropriate (ED POL 3 of the CDP, as varied).

Section 9 of this report sets out the Spatial Implementation Actions in respect of a number of key locations across the county, consistent with the settlement and economic hierarchies in the CDP and cognisant of the planning policies (ED POL 4-7), whilst seeking to promote high value economic sectors and clusters in keeping with the comparative strengths of the county (reflecting ED POL 8) and innovative new initiatives to support FDI and other employment generating activities in the county (ED POL 12, which relates to developing and enhancing the Sister Cities Project between Meath County Council and the Town of Cary, North Carolina, with a particular focus on sharing and learning from best practices in economic development implementation).⁹⁷

⁹⁶ Analysis of Meath’s serviced accommodation is provided in Section 8, which includes consideration of the county’s stock of hotel, B&B and guesthouse beds in comparison with the country as a whole.

⁹⁷ The importance of developing relationships with ‘twin’ locations elsewhere in the world was one of the initiatives raised in our consultations with IDA Ireland.

5 Relevant European Policy Context and Economic Developments

5.1 Building a More Competitive EU

The EU budget for the period 2014-2020 marks a decisive shift towards RD&I and other economic growth-enhancing activities, with a 30% increase in real terms in the budget for Horizon 2020, the new EU programme for research and innovation. A further €83 billion is expected to be invested in RD&I as well as SMEs through the new European Structural and Investment Funds. These measures form a central part of the EU's Europe 2020 strategy. That strategy is about "Building Growth" and may be seen as less aspirational, and more realistic, compared with the previous 2010 strategy, which, it is fair to say, did not succeed in achieving the vision of making the EU the most competitive, dynamic and innovation region in the world (reflecting underlying issues in policymaking and its implementation in the EU, which have been most manifest in how the region has dealt with the economic/financial crisis from 2008, including the banking crisis and economic management). That crisis has exposed structural weaknesses in the European economy and today it is widely accepted that the EU still has a very long distance to travel towards the goal of achieving integrated, competitive goods and services, and labour markets. In addition to these major and fundamental challenges, the EU comprises different Member States with different states of fiscal performance – Ireland being one of a group of countries with an Excessive Deficit Procedure (EDP) deadline to be achieved at the end of 2015 (namely 3% general government deficit of GDP) – and there remains the issue of maintaining discipline among the euro zone members. Ireland has also agreed with the European Commission a series of country-specific recommendations to reform its research and innovation policies with a view to becoming more competitive and to help build a more competitive EU-level economy.⁹⁸

5.2 European Funding Opportunities

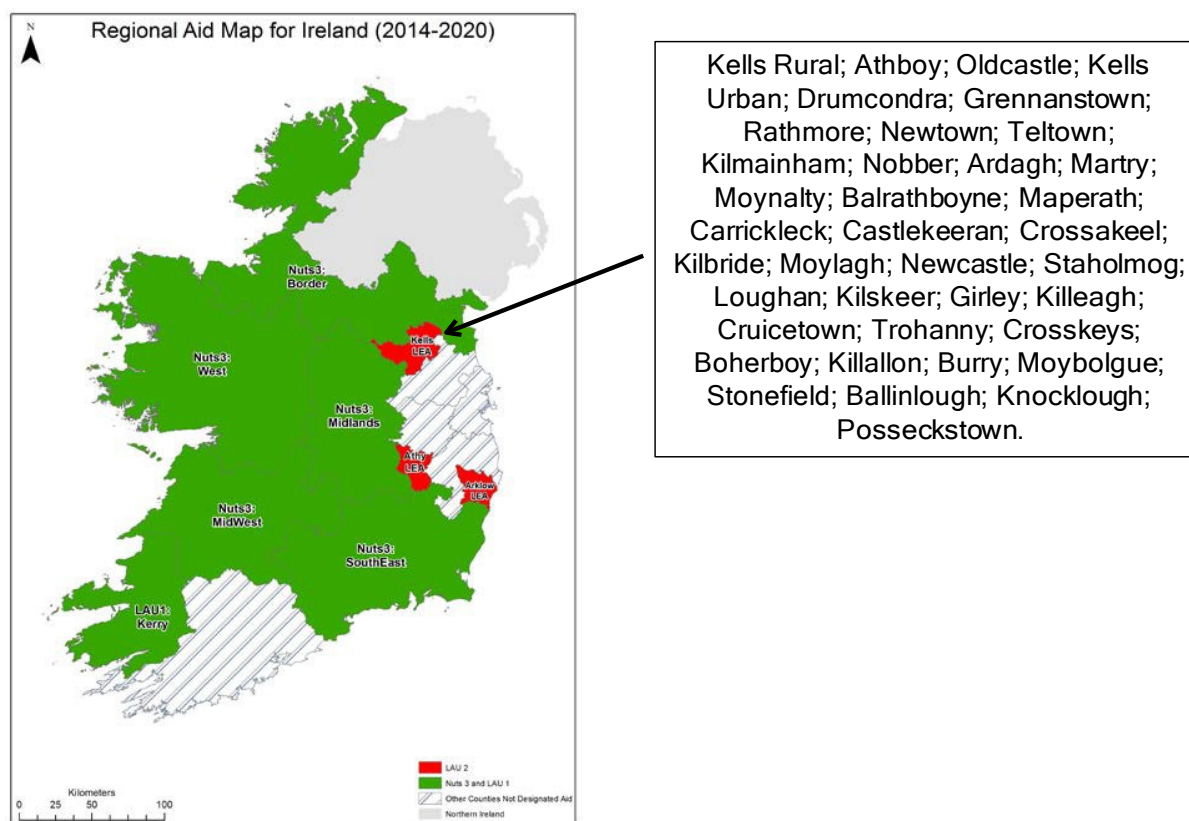
New EU Regional Aid Map 2014-2020

Undoubtedly one of the most significant new funding opportunities for Meath concerns the recently agreed 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 and features in the action planning subsequently in the report.⁹⁹

⁹⁸ The recommendations for Ireland are available at http://ec.europa.eu/europe2020/making-it-happen/country-specific-recommendations/index_en.htm. As outlined below in Sub-Section 5.3 (Economic Context and Developments), Ireland as a whole is classified as an 'innovation follower' in the EU.

⁹⁹ Details of the new map for Kells and environs, showing each specific area covered and the corresponding population in 2011, are provided in Section 7 (see Figure 7.8, p. 110, and Table 7.10, p. 111, and the commentary around this important development).

Figure 5.1: New Regional Aid Map for Ireland (2014-2020) – Details of the Electoral Divisions in Meath Included in the Map



Source: Department of Jobs, Enterprise and Innovation (DJEI), consultancy team review.

The new map became effective from 1 July 2014 and means that the Irish government will be able to provide enhanced State aid to the eligible areas identified in the map. The aid will include EI and IDA Ireland grants – 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 specific 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 in broadening and diversifying the local economy as well as providing financial support to enterprises (indigenous and foreign-owned) in the area.

EU Horizon 2020

Horizon 2020 (not to be confused with the IDA initiative of the same name, outlined earlier) is the EU's latest Framework Programme for the period 2014-2020 and aims to combine scientific research with commercial innovation to help build a more competitive and innovative EU (it follows on from the Seventh Framework Programme during 2007-2013). A total of almost €80 billion is being made available during Horizon 2020 and this will be available to enterprises and research institutions on a competitive basis (the budget represents a real terms 30% increase on the level of funding budgeted under FP7). Ireland has set itself the target of winning €1.25 billion from Horizon 2020 during 2014-2020 (about double what it won under FP7) and Enterprise Ireland has been given a leading role in supporting Irish-based applicants to the programme.

Horizon 2020 comprises three priorities:

- Excellence Science;
- Competitive Industry; and
- Better Society.

Over the past decade or so, Ireland has invested significant public funding in Science Foundation Ireland (SFI), the initial aim of which was to develop the country's capacity in basic scientific research in selected areas, including bioscience, nano-materials and ICT. An independent evaluation carried out for the Department of Jobs, Enterprise and Innovation in 2007 concluded that SFI had a significant impact in this regard and in the years since the review a key focus has been on encouraging the commercialisation of scientific research in tandem with enterprises. SFI announced (in July 2014) a new scheme to further strengthen Ireland's research base by attracting research professors with world-class research profiles who are undertaking research in areas of key national importance and priority. A total of €5 million in funding will be given to each successful applicant to enable them to carry out research in Ireland and the new scheme will target a number of areas, including advanced manufacturing, bio-manufacturing, energy, marine, ICT, medical devices, agrifood, climate change, smart cities, ageing, connected health, and digital platforms, content and applications. It is envisaged that this new scheme will help to put Irish-based researchers in a better position to compete for the larger funding pool available under Horizon 2020 and future FPs expected to come.

Horizon 2020 includes the 'SME Instrument', aimed at single SMEs or groups of SMEs determine to turn new ideas into workable, commercial actions. Enterprise Ireland has been given responsibility for supporting this and the other activities under Horizon 2020 in Ireland. It is important that the funding opportunities are clearly communicated to SMEs in Meath and there is a role for Meath LEO in this process as well as EI.

EU Energy Policy and Initiatives

As remarked earlier, tackling climate change and global warming are major challenges for the international community. The EU has been active on a number of fronts, including its '20-20-20' plan, which envisages a (1) 20% reduction in GHG emissions by 2020, (2) 20% energy efficiency by 2020 and (3) 20% of the EU's energy consumption to be from renewable sources by 2020. The deployment and use of renewable energy in the EU is provided for in the EU Renewable Energy Directive. The Directive (2009/28/EC) aims to ensure a share of renewable energy sources in the EU of 20% of overall energy consumption by 2020. In addition, the Directive strengthens the legal framework for promoting renewable electricity generation and requires Member States to formulate action plans for the development of renewable energy nationally. The renewable targets for Member States, which are binding, differ because they are at different stages in their use of renewable energy resources.

The National Renewable Energy Action Plan (NREAP) sets out Ireland's approach to deliver on the country's 16% renewable energy target by 2020 under Directive 2009/28/EC. This overall target applies to electricity, heat and transport, for which there are individual targets (e.g. 40% of all electricity used in Ireland is to be sourced from renewable sources by 2020, the principal source of which is onshore wind but renewable sources also include biomass, geothermal and solar).¹⁰⁰ Given the (unique in an EU context) Single Electricity Market (SEM) on the island of Ireland, both parts of the island (including their respective energy departments, regulators and providers) are working in tandem towards the achievement of the targets (e.g. the 40% renewable electricity target also applies in NI).

As an indication of the potential economic impact of Ireland's renewable energy strategy, the DCENR's 'Strategy for Renewable Energy: 2012-2020' states (p. 2) that "the renewable energy sector affords a major opportunity for growth and employment creation ... Employment opportunities in relation to renewable energy will also arise in the areas of manufacturing and assembly, services (including ICT) and the supply chain". The strategy identifies five strategic goals: increasing both onshore and offshore wind; building a sustainable bioenergy sector; fostering research and development (R&D) in renewable energy technologies such as wave and tidal; growing sustainable transport; and building robust and efficient electricity networks.¹⁰¹

On 22 January 2014, the European Commission announced a new framework for climate and energy goals aimed at ensuring a competitive, secure and low-carbon EU economy during 2020-2030. By 2030, the goal is to achieve a reduction in GHG emissions of the order of 40% below the 1990 level, an EU-wide binding target for renewable energy of at least 27% above the 1990 level, renewed ambitions for energy efficiency policies, a new governance system and a set of new indicators to ensure a competitive and secure energy system. The new targets, which aim to build on the 20-20-20 vision, are motivated in part by rising energy costs in the EU and the need to complete the EU internal energy market.

A major issue confronting European energy policy is security of supply, owing in large part to the EU's reliance on external oil and gas, and the consequences of geo-political risks in the Middle East, Russia and Ukraine. As part of addressing the issue of security of supply, the EU is ramping up investment in energy research and innovation during 2014-2020. Under Horizon 2020, about €6 billion (around a doubling compared to FP7) will be dedicated to energy efficiency, to smart cities and communities and to secure, clean and low carbon technologies. At least 85% of this amount has been ring-fenced for renewable energy, end-user energy efficiency, smart grids and energy storage technologies. Increased funds will also be available for financial instruments, public private partnerships and SME projects in the field of energy technology and innovation. Furthermore, EU funding during the period 2014-2020 is also available under the European Structural and Investment Funds, where a minimum of €23 billion has been ring-fenced for the "Shift to low-carbon economy" Thematic Objective. This represents a significant increase in EU support for mass-deployment of renewable energies, energy efficiency, low-carbon urban transport and smart grids solutions in the EU.

¹⁰⁰ The 40% target in respect of electricity is referred to in the NREAP as the 'RES-E' target. The 'RES-H' target is that 12% of all heat will come from renewable energy sources by 2020 and the 'RES-T' target is that 10% of all vehicles will be powered by electricity by 2020, which relates to the RES-E target. The three targets together feed into the overall target that 16% of all energy used will come from renewable energy sources by 2020.

¹⁰¹ The DCENR's strategy document is available at http://www.dcenr.gov.ie/NR/rdonlyres/9472D68A-40F4-41B8-B8FD-F5F788D4207A/0/RenewableEnergyStrategy2012_2020.pdf.

Irish Regions Brussels Office

The Irish Regions Brussels Office provides EU information and advice to the regional assemblies, regional authorities and local authorities, including calls for funding opportunities for cross-border projects. Individuals and businesses can apply for funding for projects and two Irish officials at the office are available to assist with queries. Such funding opportunities – for example, in infrastructure, tourism, skills, twinning and networking of towns, sustainable energy and socio-economic development – can be of significance to local enterprises and local authorities like Meath County Council can make such opportunities known to businesses and other potential applicants in Meath through the website.

Box 5.1: Example of the Significance of EU Funding for Irish Partners – Clare Wave Energy Project

Three years after being shortlisted among 78 bids for consideration, a Co. Clare-based project to demonstrate how wave farms can be built, deployed and operated off the Irish coast has been awarded €23.3 million (having previously been 'green-lighted' for €19.8 million) by the Commission 'NER 300' programme. This scheme is the world's largest demonstration programme to attract investment in innovative renewable energy (bioenergy, concentrated solar power, photovoltaics, geothermal, wind, ocean, hydropower, and smart grids) and carbon capture and storage (CCS) technologies that are proven, but have not yet been implemented at full-scale. It allocates funding derived from the sale of 300 million emission allowances held in the New Entrants Reserve (NER) of the EU Emissions Trading System (ETS).

The WestWave project, to be based near Doonbeg in Co. Clare, is led by ESB International in conjunction with a number of wave energy technology and national and local public body partners. It is the only Irish initiative, and one of only 4 on the ocean energy theme, among 42 approved to date which will avail of a total of €2.18 billion in support from the programme. WestWave aims to install and operate wave energy converters which will be capable of generating 5MW of clean electricity as of 2018. It is also intended to pave the way for commercial projects, in terms of consenting procedures, such as foreshore licensing, permitting, electrical grid access and local infrastructure.

Source: Irish Regions Brussels Office (June-July 2014 Bulletin), consultancy team review.

5.3 Economic Developments

Overview of the Irish Economy in 2014

In December 2013, Ireland emerged from the EU/IMF or Troika bailout programme (the Troika comprising the European Commission, the European Central Bank or ECB and the IMF or International Monetary Fund). On one level, there is much to be pleased about regarding the Irish economy. The rate at which the Irish government can borrow on the sovereign debt market has come down significantly in the past few years and the country has been creating jobs on an appreciable scale. This is reflected in the falling rate of unemployment, which has declined from 15.1% in the first quarter of 2012 (2012Q1) to 11.5% in July 2014 (and Ireland's unemployment rate is now the same as that in the EU28) (International Labour Organization or ILO basis, seasonally adjusted). The fiscal situation is also improving and it is now widely accepted that Ireland will meet its budgetary targets, the most immediate of which is the requirement to reduce the general government budget deficit to 3% of gross domestic product (GDP) by the end of 2015, as agreed with the Troika. In addition, recent years have seen growing FDI and also employment growth among agency-assisted Irish-owned companies too (Meath has been performing well on the latter front but less strongly on FDI). Tourism into the country is growing and there are signs of returning consumer confidence in the form of higher retail sales.

However, the fiscal adjustment to address the crisis has necessarily impacted on Irish consumers and businesses. Perhaps most importantly of all, while a significant effort has been made to address the crisis in the public finances and the near complete collapse of the banking sector, there are still a number of deep-rooted structural issues concerning the Irish economy.

The banking sector – in particular, the retail banking sector affecting personal consumers and small businesses – has become less competitive and this is reflected in higher costs associated with doing banking (e.g. the ending of fee-free current accounts or the introduction of conditions to receive fee-free current account banking and mortgage holders have seen higher variable rates despite wholesale rates in Europe being historically low).¹⁰²

Many of the more sheltered sectors of the Irish economy – including the traditional professions like the law and medicine – remain burdened by disproportionate restrictions on competition which the Competition Authority has been highlighting for many years and which the Troika have targeted to remove but progress remains slow.

While the rate of inflation remains subdued, reflecting the recessionary impact of the crisis across Europe, Ireland is at the same time characterised by high price levels, which reflect a number of factors, including its peripheral location on the edge of western Europe and its small scale as well as the challenge of enhancing competition and making the country a lower cost location for all of its residents, not just larger businesses.¹⁰³ Thus, for example, energy (electricity, oil and gas), insurance (including health insurance) and transport are all relatively expensive in Ireland.

There is also a large dependency culture in the country, which stems from the recession but also rests on poorly designed active labour market programmes (ALMPs) for the unemployed: research evidence shows that most public spending on such interventions is channelled into programmes that are only weakly linked with employers' needs and, while reform is being advanced, there is still a long way to go on this front. As the recovery strengthens, and the rate of unemployment continues to fall, there is a

¹⁰² Furthermore, recently published independent evidence from the Central Bank (SME Market Report 2014H1) shows significant issues continuing in respect of lending to SMEs. According to the new report, which will come out twice yearly henceforth, in a European context, Irish SME credit conditions remain closer to those of Greece, Italy, Spain and Portugal than to those countries with the most favourable conditions. The share of discouraged borrowers (those not applying for credit due to the expectation that they will be refused) is significantly higher in Ireland and Greece than elsewhere in the eurozone. The Central Bank research also finds that the SME credit market has become increasingly concentrated between 2011 and end-2013, with the Herfindahl-Hirschman Index (HHI) of new credit flows increasing from 0.3 to 0.45 over the period (the HHI is generally defined as the sum of the squares of the market shares of all firms in the relevant market; the rise in the HHI observed by the Central Bank in this research is very large by any comparison). The SME Market Report 2014H1 is available at <http://www.centralbank.ie/press-area/press-releases/Documents/140626%20SME%20Market%20Report.pdf>.

¹⁰³ Recent data on price levels published by Eurostat confirms Ireland's high price levels in an EU context, with prices almost 20% higher in Ireland compared with the EU28 in 2013. Ireland emerges as the fifth most expensive country in respect of consumer goods and services in the EU, behind Denmark, Sweden, Luxembourg and Finland (Switzerland and Norway are also more expensive than Ireland). The differential for Ireland relative to the EU is even higher in regard to restaurants and hotels (28% above the EU28) and alcoholic beverages and tobacco (78% above the EU28) (reflecting government taxation but this also serves to increase prices faced by visitors to the country). The only segment in which price levels in Ireland are lower than the EU28 is clothing (2% below). See http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Comparative_price_levels_of_consumer_goods_and_services.

danger that the government (more particularly the Department of Social Protection) will ease off on its reform of the social welfare system (which was shown to be ineffective when the crisis struck in 2008).

Furthermore, it is commonly perceived or believed (internally) that Ireland has a world-class education and innovation system. This is erroneous: the evidence from independent sources indicates otherwise and the facts are worrisome in the context of the increasingly competitive international marketplace for FDI, where emerging market and/or lower cost economies are becoming more formidable competitors to Ireland for inward investment. The intensifying competition for FDI may be closer to home than one might think – Scotland (regardless of how the vote on independence goes) and Northern Ireland (NI) are likely to become stronger competitors to Ireland in respect of FDI in the coming years, during the period of the Economic Development Strategy for Meath (2014-2022) (this comment applies to the whole of the UK). In response, Ireland needs to pull upon and enhance other levers for generating FDI (like education and innovation) and not just be reliant on its favourable corporation tax rate and system, which has come under international scrutiny in the past year, which is expected to continue.

On top of all these caveats stand the political cycle and the results of the recent local and European elections, which saw the popular vote for the junior coalition party (Labour) fall significantly. Pressure is beginning to come on the government to take a more relaxed approach to the fiscal adjustment process. There is also the popular perception of a mini property boom taking effect in the country, with growth in house prices and also growing concerns over rising rents countrywide – as if nothing has been learned from the crisis. The recent pick-up in activity in the property market illustrates the bottoming out of the crisis and there is, perhaps understandably enough, a sense of rush to purchase among those who can afford to buy houses as they become aware of the cycle (in the same way as there was a rush out of the property market in 2008 after the onset of the crisis, so there is now a sense of panic to get back into the market – what the famous British economist John Maynard Keynes famously termed “animal spirits”, or a “shawl of fish swaying to grab opportunity or avoid danger”, as we would describe it).

Our overall view on the economic front is simple enough: given the severity of the economic crisis in the country and the scale of the structural reforms needed to fundamentally improve Ireland’s economic performance, adherence to the Troika programme is non-negotiable and an imperative in the coming years. While the Troika may have exited the country, they will continue to keep watch over the country and to maintain pressure to implement the necessary reforms that will be to the longer-term benefit of the economy. Thus, while recovery is now underway, it continues to remain fragile and it will be necessary to maintain fiscal discipline until (at least) 2018. A key challenge in the process to correcting the public finances in the medium-term (the EU Fiscal Compact basically requires Ireland and other Member States to eliminate their structural budget deficits by the end of the decade) will be to ensure that there are no further income tax rises in Ireland. When the Universal Social Charge (USC) is considered alongside income tax and national insurance, the effective marginal rate of income tax in Ireland is currently well over 50% for higher earners – in a country with one of the most progressive income tax systems in the EU and Organisation for Economic Cooperation and Development (OECD).¹⁰⁴

¹⁰⁴ See, for example, Callan, T., Keane, C., Savage, M. and Walsh, J. R. (2013) ‘Taxes on Income: Ireland in Comparative Perspective’ in *Budget Perspectives 2014* (Ed. Tim Callan) ESRI Research Series No. 31, June 2013; Department of Finance (2013) ‘Distributional impact of recent budgets and progressivity issues’, available at: <http://budget.gov.ie/budgets/2013/Documents/Annex%20F%20-%20Progressivity.pdf>; and McCloughan, P. (2015) ‘Income and Income Tax Inequalities in Ireland – New Evidence and Further Illustration of the Progressivity of the Irish Income Tax System’, forthcoming in the *Journal of the Statistical and Social Inquiry Society of Ireland* (the version of the paper presented to the SSISI Meeting of December 2013 in the Royal Irish Academy is available at <http://www.ssis.ie/meeting.php>).

Politically-charged proposals to increase the top marginal rate of income tax are ill-advised and myopic – they will merely punish the most productive workers in the country and reduce their incentives to give more effort in the workplace; likewise, the consultancy team is of the view that it is too early in the recovery to be talking about lowering income tax rates.

The international environment – particularly in Europe – remains uncertain and political developments in the Middle East and Ukraine/Russia look set to have a bearing on energy costs, impacting on Irish people and businesses. The projections used to inform the Economic Vision for Meath in 2022 are based on latest available independent sources and reflect these issues as well as the positive prospects for the Irish economy in the medium-term.

Medium-Term Economic Strategy (MTES) 2014-2020

In December 2013, the government published its Medium-Term Economic Strategy (MTES) 2014-2020, which includes baseline macroeconomic and fiscal projections during the period and sets out a three-pronged strategy for growth and jobs in the post-Troika environment. The three pillars of the MTES are: *ensuring debt sustainability*, which relates to keeping the public finances under control while at the same time ensuring a competitive tax system; *financing growth*, which relates to resolving the access to finance problems faced by small businesses and tackling personal debt among households; and *supporting employment and living standards*, which aims at ensuring a jobs-rich recovery.

The MTES is also mindful of the reforms occurring in the local government system, where it highlights new responsibilities for economic development being devolved to local level. In this regard, it highlights the role of the new LEOs in helping new local start-ups and micro enterprises, where the LEOs will serve as a first-stop-shop for all businesses and signpost firms to the most appropriate support services, including brokering introductions to Enterprise Ireland for enterprises having the potential to export.

The MTES also mentions the creation of Irish Water and the importance of ensuring adequate water supply and quality for economic development across local authorities in Ireland. The MTES furthermore highlights the more autonomous financing arrangements being put in place in regard to local authorities, where households as well as businesses and central government will contribute to local government funding. The ability to vary the level of the Local Property Tax (LPT) will serve to make local authorities and their elected representatives more accountable and this should help to enhance local democracy, other things being equal.

Ireland's Stability Programme Update (SPU)

The European Semester refers to the economic policy coordination now in place among Member States of the EU and the process aims to achieve the 2020 targets (fiscal and other economic policy targets) in a coordinated manner. As part of the European Semester, each Member State is required to submit a Stability Programme Update (SPU) to the European Commission in April of each year. Ireland's SPU was submitted and published in April 2014 and reflects the inputs of the Irish Fiscal Advisory Council (IFAC). The SPU, along with the most recent IMF projections (April 2014) and the MTES projections (December 2013) are incorporated into the projections for employment growth in respect of Meath during 2014-2022 (remembering that the baseline or factual employment situation for the county, as with all Irish counties, is provided for in Census 2011 – specifically the data captured in the CSO's POWSCAR data, which has been considered extensively in this study). The various independent projections concerning

the Irish economy are shown in tabular form below.¹⁰⁵ The projections used for Meath also include the most recent Medium Term Review (MTR) (July 2013) from the Economic and Social Research Institute (ESRI), which provide ‘pessimistic’ and ‘optimistic’ growth scenarios referenced in this study.

OECD Reviews of the Irish Economy and the Action Plan for Jobs

In its Economic Survey of Ireland 2013, the OECD recommended that decisive labour market policy interventions are needed. It proposed that the number of case-workers supporting long-term jobseekers should be increased through internal re-deployment and that a systematic evaluation of ALMPs should be undertaken (with the understanding that those shown to be ineffective or not working should be significantly reformed or scrapped). The OECD also proposed that (the fiscally-limited) resources should be focused on policies empirically-proven to help regain employment (i.e. on those ALMPs closely aligned to the labour market or the needs of employers).¹⁰⁶

In its preliminary review of the Action Plan for Jobs, published earlier this year, the OECD observes that Ireland is on track to achieve the goals set out in the initiative – namely the creation of 10,000 new jobs by 2016 and restoring the number of people employed to 2 million by 2020, which was revised to 2.1 million in light of the publication of the government’s MTES 2014-2020 in December 2013.¹⁰⁷ However, the OECD continues to emphasise the importance of maintaining a “relentless focus on activating those most vulnerable to alienation from the labour market” (p. 3) and to ensure that the Action Plan for Jobs be “buttressed by strong labour activation policies” (p. 7) to address long-term and youth unemployment, and to combat the proportion of young people who are ‘not in education, employment or training’ (NEET rate).

In respect of reform of ALMPs recently introduced to tackle unemployment, the OECD highlights the Pathways to Work initiative (launched in 2012), which seeks to reform the benefits system, employment programmes and services for jobseekers and employers. The OECD also welcomes the reductions to the level and duration of unemployment benefits and the creation of ‘Intreo’ centres, designed to act as one-stop-shops to guide and assist the unemployed. The OECD’s preliminary review puts emphasis on assisting the most disadvantaged in the labour market because they risk getting left behind as the recovery gains momentum and the OECD concludes by (*inter alia*):

- Welcoming the planned introduction of a youth guarantee scheme in Ireland – provided it is targeted at disadvantaged youths and other marginalised segments of the unemployed;
- Advising strengthening of the provision of training, especially for the disadvantaged – and ensuring a coordinated approach by SOLAS and the rollout of the Intreo offices;
- Highlighting that scarce resources are devoted to the most effective ALMPs – including reform of the long-established Community Employment Scheme and continued focus on ensuring that the Pathways to Work strategy is effective in meeting the needs of the labour market;
- Developing a modern apprenticeship scheme.

¹⁰⁵ The next set of fiscal and budgetary forecasts is scheduled for budget time in mid-October 2014, and will take into account budget measures which will be the subject of government decisions in the meantime (under the watch of the IFAC and the Troika).

¹⁰⁶ The OECD’s 2013 survey report is available at <http://www.oecd.org/economy/economic-survey-ireland.htm>.

¹⁰⁷ The OECD’s publication Ireland’s Action Plan for Jobs: a preliminary view (2014) can be found at <http://www.enterprise.gov.ie/en/Publications/APJ-Preliminary-Review.pdf>.

In addition, the OECD also highlights the importance of improving the monitoring of the policy interventions in respect of tackling unemployment and enhancing the evidence of progress (the same principles apply in respect of the Economic Development Strategy for Meath).

At the end of April 2014, the government released an update to say that over 46,000 long-term unemployed people have returned to work since introduction of Pathways to Work initiative in 2012.¹⁰⁸ The press release also says that the country is on track to achieve the target of helping 75,000 long-term unemployed people back into work by the end of 2015 through Pathways to Work. In addition, according to the government, 44 Intreo centres are now open nationwide offering a one-stop-shop where jobseekers can get income supports and employment supports in the one place for the first time. There are currently Intreo centres in Navan and Drogheda.

Continued Troika Surveillance of the Irish Economy

As part of the annual cycle of economic coordination under the aforementioned and outlined European Semester, all 28 Member States of the EU are subject to close scrutiny by the European Commission. Moreover, following Ireland's exit from the EU-IMF Programme on the 15 December 2013, European Commission Post-Programme Surveillance will continue until 75% of the EU-sourced financial assistance has been repaid and IMF Post-Programme Monitoring will continue until such time as the outstanding credit falls below the threshold of 200 percent of quota IMF programme funding.

Unlike the programme reviews that took place over the last three years, where the focus was on programme implementation and which culminated in the approval of programme funding to Ireland, the focus of these post bail-out missions will be on Ireland's ability to repay the outstanding loans.

The first EU-IMF Post-Programme Surveillance/Monitoring review mission to Ireland took place during the week of 28 April 2014, with officials from the Department of Finance, the Department of Public Expenditure and Reform, the Central Bank of Ireland and the National Treasury Management Agency (NTMA) meeting officials from the IMF, the European Commission and the ECB.

Officials from the European Stability Mechanism (ESM) also participated in the mission as observers.¹⁰⁹

According to the IMF's press release and article regarding the EU-IMF discussions,¹¹⁰ the Irish economy is in the early stages of recovering from an exceptionally severe banking crisis. Following a smooth exit from the EU-IMF supported program, strong job creation and other indicators suggest Ireland's economic recovery is broadening. Together with other European periphery countries, Ireland currently enjoys favourable financial market conditions. Nonetheless, important challenges remain, with unemployment still high, credit continuing to contract, and significant public and private balance sheet fragilities.

Policies to help sustain the recovery and progressively reduce vulnerabilities were therefore the focus of the discussions:

¹⁰⁸ <http://www.merriestreet.ie/index.php/2014/04/government-on-track-to-get-75000-long-term-unemployed-people-back-to-work-by-end-2015/>.

¹⁰⁹ The ESM is an international organisation located in Luxembourg. Established on 27 September 2012, it aims to act as a permanent firewall for the euro zone to safeguard and provide instant access to financial assistance programs for members of the euro zone in financial difficulty, with a maximum lending capacity of €500 billion. The ESM replaced two earlier temporary EU funding programmes, namely the European Financial Stability Facility (EFSF) and the European Financial Stabilisation Mechanism (EFSM). All new bailouts for any euro zone member country will now be covered by ESM, while the EFSF and EFSM will continue to handle money transfers and program monitoring for the previously approved bailout loans to Ireland, Portugal and Greece.

¹¹⁰ See <http://www.imf.org/external/pubs/cat/longres.aspx?sk=41656>.

- Steady progress on fiscal consolidation is needed to put high public debt on a firmly downward path;
- Rebuilding banks' lending capacity, especially by resolving high non-performing loans, is needed to support sustained domestic demand revival;
- Resolution of mortgage distress remains an outstanding challenge that requires continued intensive effort and workouts or disposals of impaired commercial real estate loans should be "energized" in the words of the Troika;
- Employment and investment should be facilitated while limiting fiscal risks. Further improving engagement with the long-term unemployed and ensuring training meets employer needs is essential;
- The Ireland Strategic Investment Fund (ISIF) aims to support growth through commercial investments, including in SMEs and infrastructure, yet entails major operational challenges – the Troika has advised that "commerciality should be ensured through close scrutiny of project returns and substantial private investor participation, and the need for ISIF should be reviewed periodically".

The IMF also observes the following of relevance here (our italics):¹¹¹

"Construction remains depressed with former construction workers a significant portion of the unemployed. At the same time, supply shortages are driving house price rises in some urban areas. Key steps in the plan to address these issues are *improving planning flexibility, reducing local taxes on developers, and promoting the use of vacant sites in urban areas*".

Other Relevant Economic Considerations

National Competitiveness Council's Cost of Doing Business 2014

The National Competitiveness Council (NCC) was established in 1997. It examines competitiveness issues facing the Irish economy and offers recommendations on policy actions required to enhance Ireland's competitive position. Forfás, Ireland's policy advisory board for enterprise, trade, science, technology and innovation, provides the NCC with research and secretariat support.

The NCC's Costs of Doing Business 2014 analyses a range of indicators relating to Ireland's enterprise cost performance *vis-à-vis* the country's key competitors. The analysis concentrates on costs that are largely domestically determined such as labour, property, energy, water, waste, communications and business services. This report is a deliverable under the Action Plan for Jobs 2014.¹¹²

The report finds that Ireland's costs base has improved across a range of metrics over the last number of years making Irish firms more competitive internationally and making Ireland a more attractive location in which to base their operations.

It also finds, however, that despite these improvements Ireland is still a high cost location for a number of key business inputs. The NCC points to the economy being at a turning point in terms of cost competitiveness, with overall relative cost competitiveness declining and a series of upward cost pressures emerging:

¹¹¹ *Ibid.*, full article (p. 14).

¹¹² The report is available at <http://www.competitiveness.ie/publication/nccSearch.jsp?ft=/publications/2014/title,12039,en.php>.

- The harmonised competitiveness indicators show that Ireland's relative cost competitiveness is now deteriorating *vis-à-vis* our main competitors;
- Labour costs are rising again following a number of years decline;
- Industrial electricity prices have increased in recent years; and
- An upward trend is evident across a range of business service costs.

The NCC emphasises the importance of Ireland's international cost competitiveness remaining a key economic priority and cautions that further structural change is required to ensure that costs do not escalate and erode competitiveness gains already made.

An important point made in the NCC report is that during the downturn years since 2008, much of the competitiveness improvements in Ireland were driven by low demand, and thus low pressure on prices and costs, reflecting the depressed nature of the economy at the time, rather than through structural changes to tackle bottlenecks and enhance competitiveness (many of the reforms highlighted by the EU/IMF (Troika) have been slow in coming or are still under consideration by the Irish government). As a result, competitiveness in Ireland appears to be cyclical rather than structural (preferable) and as the economy recovers and demand picks up, price and cost pressures could damage competitiveness and thus sustainable recovery.

This could work two ways for Meath: one is the opportunity for Meath to present itself as a cost-competitive location in the context of the GDA; the other is that higher costs threatening Dublin could permeate Meath as well as in turn risk future FDI into the region, if not the country. This in turn highlights the importance of structural reform of the economy, which has largely been absent in recent years.

Price Levels in Ireland – More Evidence that Ireland is a High Price/Cost Country

Forfás, the national policy advisory board for enterprise, trade, science, technology and innovation, published on 6 February 2014 Consumer Costs and Inflation, which benchmarks Irish inflation and price levels against key competitor countries.¹¹³ The main results of this study reflect the aforementioned Eurostat data showing high price levels in Ireland, even though inflation in Ireland has been kept at low levels.

The report makes a range of recommendations that aim to encourage competition in specific sectors where price levels are relatively high by international comparison. These include actions to promote competition in the public transport, health insurance, pharmaceutical and dentistry sectors plus the application of Better Regulation principles across economic sectors. In addition, Forfás has highlighted the need for investment in essential economic infrastructures as means to improve efficiency, enhance productivity and lower costs.

¹¹³ <http://www.forfas.ie/publication/search.jsp?ft=/publications/2014/Title.11653,en.php>. Price changes or inflation can be tracked from national and international sources (e.g. CSO and Eurostat). Comparing price levels between countries is a more challenging task – owing in part to differences in costs among countries – and Forfás commissioned work that gathered together studies of price levels among countries from surveys and other sources – although the Forfás study does not go into detail regarding the methodology used to assess price levels.

IMD World Competitiveness Yearbook

Each year, the Institute for Management Development (IMD) (based in Lausanne, Switzerland) publishes its World Competitiveness Yearbook (WCY). The IMD WCY provides a reasonably comprehensive annual report on the competitiveness of nations and has become an important source of information and reference point for governments, businesses and investors internationally. It is the result of assessment of over 300 competitiveness criteria assembled by the IMD through desk research of international, national and regional information sources and using feedback from the businesses, government agencies and academics. The WYC is not the only competitiveness ranking of countries – others include the World Economic Forum’s The Global Competitiveness Report – and while there is no definitive set of rankings, they are generally consistent. They also illustrate that more effective structural policies by governments can make the difference between one country’s competitiveness *relative* to others.

The IMD WYC 2014 was published on 22 May 2014 and Ireland attained an overall ranking of 15th place out of 60 countries assessed, up from 17th place in 2013 out of 60 countries ranked. The US retained its top ranking as the world’s most competitive country, followed by Switzerland, Singapore, Hong Kong and Sweden. The UK’s ranking this year is 16th and was 18th in 2013 – moving two places up, like Ireland.

The graphic in Figure 5.2 below is based on our review of more disaggregated data contained in the IMD WCY 2014 relating to the ‘competitiveness landscape’ of Ireland and comparator countries – namely other small economies in Europe and internationally, and the UK.¹¹⁴ We have applied a ‘traffic lights’ system to the IMD’s ranks in each of the sub-categories, with red indicative of ‘uncompetitive’ performance, amber ‘competitive’ and green ‘highly competitive’ (although the traffic light system is subjective and there are fine lines between the classifications, e.g. between a rank of 20 and 19). The loops that we have superimposed on the rankings reflect our assessment of *clusters* of competitiveness strengths in the countries reviewed.

¹¹⁴ As well as the UK, the small country comparators to Ireland are Austria, Denmark, Finland, New Zealand, Singapore, Sweden and Switzerland (8 comparators in all).

Figure 5.2: Competitiveness Landscape in Ireland and the Comparator Countries (2014)

Indicator	Rank 2014 (Out of 60 Countries Ranked)								
	Aus	Den	Fin	Ire	NZ	Sing	Swe	Switz	UK
Economic Performance									
Domestic Economy	24	26	47	43	37	7	18	5	12
International Trade	10	12	35	26	46	2	25	22	20
International Investment	25	26	44	4	47	5	9	14	6
Employment	26	37	44	50	34	5	39	15	29
Prices	24	38	34	18	22	51	28	45	32
Government Efficiency									
Public Finance	39	12	29	51	9	4	21	7	43
Fiscal Policy	58	41	44	16	20	10	46	7	30
Institutional Framework	24	9	11	22	19	2	5	1	4
Business Legislation	34	7	5	4	1	3	6	13	12
Societal Framework	14	4	3	12	11	20	2	8	18
Business Efficiency									
Productivity & Efficiency	9	12	13	5	29	15	6	2	20
Labour Market	24	38	29	15	39	11	23	13	20
Finance	36	14	13	25	18	8	10	3	11
Management Practices	14	1	5	6	28	15	9	3	20
Attitudes and Values	38	9	18	1	12	3	11	8	23
Infrastructure									
Basic Infrastructure	16	6	11	31	19	14	10	7	20
Tech. Infrastructure	23	9	10	19	25	2	6	7	18
Scientific Infrastructure	16	13	12	22	27	17	8	4	10
Health and Environment	11	2	5	9	15	24	1	3	20
Education	13	1	3	12	11	2	7	4	15

Uncompetitive
Competitive
Highly Competitive

Source: IMD WCY 2014; consultancy team review.

While Ireland has strengths in international investment (FDI), business legislation, productivity and efficiency, management practices, attitudes and values, and in health and environment, it does not have any apparent *clusters* of competitiveness strengths within the categories. The same goes for the UK, Austria and New Zealand.

On the other hand, the other countries have the following apparent clusters of competitiveness strengths (which were also apparent in 2013):¹¹⁵

- Denmark – two clusters in (a) institutional framework, business legislation and societal framework and (b) infrastructure ('hard' and 'soft');
- Finland – same as Denmark;

¹¹⁵ Ireland had no apparent clusters of strengths in the 2013 rankings.

- Singapore – two clusters in (a) economic performance (apart from prices, which reflects the inflationary pressures in this extremely densely populated island nation) and (b) government efficiency (apart from societal framework);
- Sweden – two clusters in (a) government efficiency (although fiscal performance is weak) and (b) infrastructure ('hard' and 'soft') (like its Nordic neighbours Denmark and Finland);
- Switzerland – three unambiguous clusters in (a) government efficiency, (b) business efficiency and (c) infrastructure.

The not-so-strong competitiveness performance of Ireland in regard to technical and scientific infrastructure this year was also evident in 2013 and points to the fact that Ireland cannot be said to have a world-class education or innovation system – it is an 'innovation follower' as noted by reference to other independent EU data.¹¹⁶

Looking closely at the chart above, the key structural issues for Ireland are labour market, financing for business (SMEs) and infrastructure, including infrastructure enabling innovation (technological and scientific infrastructure). The World Economic Forum's The Global Competitiveness Report 2013-2014 highlights "insufficient capacity to innovate" (9.9% of survey responses) as one of the major infrastructural issues for Ireland, after "inadequate supply of infrastructure" (12.5%), "inefficiency government bureaucracy" (15.2%) and the main issue "access to financing" (32.4%).

Summary of Independent Economic Projections for Ireland

Table 5.1 below summarises the main economic projections for the Irish economy over the medium-term from the Department of Finance (the aforementioned SPU), Irish government MTES, the ESRI's MTR and the latest IMF estimates. The latest year covered is 2020 (MTES and the MTR). Included in the table are the actual figures for 2011 and 2012 from the IMF (estimates projections commence after 2012).

The economic projections will be used as part of our construction of the Economic Vision for Meath in the year 2022 (Section 8).¹¹⁷

¹¹⁶ Ireland continues to be ranked as an innovation follower, rather than an innovation leader, according to the Innovation Union Scoreboard 2014 (http://ec.europa.eu/enterprise/policies/innovation/policy/innovation-scoreboard/index_en.htm). Nonetheless, it is relevant to observe that, among the EU Member States, Ireland's innovation performance is ranked in the second-tier of countries lying above the EU average (which also includes the UK) but below the first-tier group comprising Sweden, Denmark, Germany and Finland. However, the EU is generally seen as less innovative than the US and emerging market economies are catching up and surpassing the EU in respect of innovation.

¹¹⁷ Using this table of projections, the analysis subsequently in the report specifies three employment growth scenarios for Meath (central, optimistic and pessimistic) (Table 8.6, p. 179).

Table 5.1: Summary of Economic Projections for the Irish Economy and Employment Growth Rates to be Used to Inform the Economic Vision for Meath 2022

Projection (Period)	Date	Variable	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
IMF (2013-2019)	2014 (April)	Real GDP Growth	2.2%	0.2%	-0.3%	1.7%	2.5%	2.5%	2.5%	2.5%	2.5%			
		Unemployment Rate (%)	14.6%	14.7%	13.0%	11.2%	10.5%	10.1%	9.6%	9.3%	8.9%			
		Employment Growth (%)		-0.6%	2.3%	2.2%	1.8%							
		General Government Deficit (% GDP)	13.1%	8.2%	7.4%	5.1%	3.0%	2.4%	1.7%	1.2%	0.7%			
		General Government Gross Debt (% GDP)	104.1%	117.4%	122.8%	123.7%	122.7%	119.6%	116.8%	113.1%	109.1%			
MTES (2013-2020)	2013 (Dec)	Real GDP Growth			0.2%	2.0%	2.3%	2.8%	3.5%	3.5%	3.5%	3.5%		
		Unemployment Rate (%)			13.5%	12.4%	11.8%	11.4%	10.6%	9.6%	8.7%	8.1%		
		Employment Growth (%)			1.6%	1.5%	1.3%	1.3%	2.0%	2.1%	2.2%	1.8%		
		General Government Deficit (% GDP)			7.3%	4.8%	3.0%	2.4%	1.0%	0.5%	0.4%	0.0%		
		General Government Gross Debt (% GDP)			124.0%	120.0%	118.0%	115.0%	110.0%	104.0%	98.0%	93.0%		
Dept of Finance (2014-2018) Stability Programme Update (SPU)	2014 (April)	Real GDP Growth				2.1%	2.7%	3.0%	3.5%	3.5%				
		Unemployment Rate (%)				11.5%	10.5%	9.7%	8.9%	8.0%				
		Employment Growth (%)				2.2%	2.0%	2.0%	1.9%	1.9%				
		General Government Deficit (% GDP)				4.8%	2.9%	2.2%	1.2%	0.0%				
		General Government Gross Debt (% GDP)				121.4%	120.0%	115.9%	112.0%	107.2%				
ESRI (MTR) (2013-2020)	2013 (July)	Employment Growth (%) - 'Recovery'		-0.6%	0.5%	0.9%	2.3%	2.9%	1.9%	2.2%	2.1%	2.1%		
		Employment Rate (%) - 'Stagnation'		-0.6%	0.4%	1.2%	0.8%	-0.3%	0.9%	0.2%	0.0%	0.4%		

Source: IMF World Economic Outlook (WEO) April 2014; Irish government MTES December 2013; Department of Finance SPU April 2014 (the SPU forecasts are also shown in the Department of Finance's Monthly Economic Bulletins, the latest release being August 2014 at the time of preparing the analysis for this report); ESRI MTR July 2013; consultancy team review.

Note: The IMF actual values for 2011 and 2012 are shown in the table because the baseline number of jobs in Meath pertains to the year 2011.

6 Summary Assessment of the Policy and Economic Developments

The last four sections of the report have taken a detailed look at the policy and economic contexts surrounding the Economic Development Strategy for Meath 2014-2022.

In respect of the policy context, the plan to broaden and improve the local economy of Meath arises at a time when much more is expected of local authorities in terms of their contribution to facilitating economic development locally and regionally, under the arrangements provided for under Putting People First (2012) and the Local Government Reform Act 2014.

In terms of the economic context, the Strategy is occurring at a time of recovery in the country and a central part of the challenge – or rather opportunity – for Meath will be to ensure more inward investment and greater knowledge-oriented activities in the county during the Strategy period.

Strategically, over the past year, Meath County Council has sought to travel far in terms of putting appropriate machinery in place to support the economic transformation of the county, including the formation of the MEF as an advisory body comprising senior personnel from business, academia and the policy environment. The ground work has been laid and the county has signalled its commitment to turn around its economy.

7 Focused Economic Profile of County Meath

7.1 Introduction

This section of the report provides a focused and detailed economic profile of County Meath, mindful of existing studies on the local economy of the county. Particular regard is given to the economic baseline study of Meath prepared by Maynooth University (June 2013), which contains information on employment performance and provides job profiles of selected urban centres in the county, *inter alia*. We present additional analysis designed to further enlighten on the comparative strengths of, and opportunities for, Meath in the coming years. The review and further analysis here also has regard to the issues confronting the Meath economy. In complementing the Maynooth University study, we liaised with the researchers from the university's Geography Department and All-Island Research Observatory (AIRO) in respect of our additional analysis concerning the structure of employment within Meath and our profiling of the commuters (inbound as well as outbound) in the county. The inbound and outbound commuters are an important human capital resource for the county, owing to their educational qualifications and other socio-economic attributes, and, along with other key features of the local economy, the commuters will be central to the Economic Vision for Meath and its realisation outlined subsequently in the report.¹¹⁸

As a prelude to these aspects of the Meath economy, we first consider an important metric of economic performance at county level in Ireland – namely county incomes – as a ‘scene-setter’.

7.2 Relative Income Performance of Meath

Household Disposable Income per Head

The map in Figure 7.1 below is reproduced from CSO data on household disposable income per head in 2011, the latest year for which the data are available.¹¹⁹ There was appreciably large variation across counties in household disposable income per head in 2011. County Meath fell within the third tier of counties on this measure of income performance, with household disposable income per head of between 95 and 100 of the State average (=100). This third tier comprised a range of counties in different parts of the country, including Sligo, Waterford and Louth.

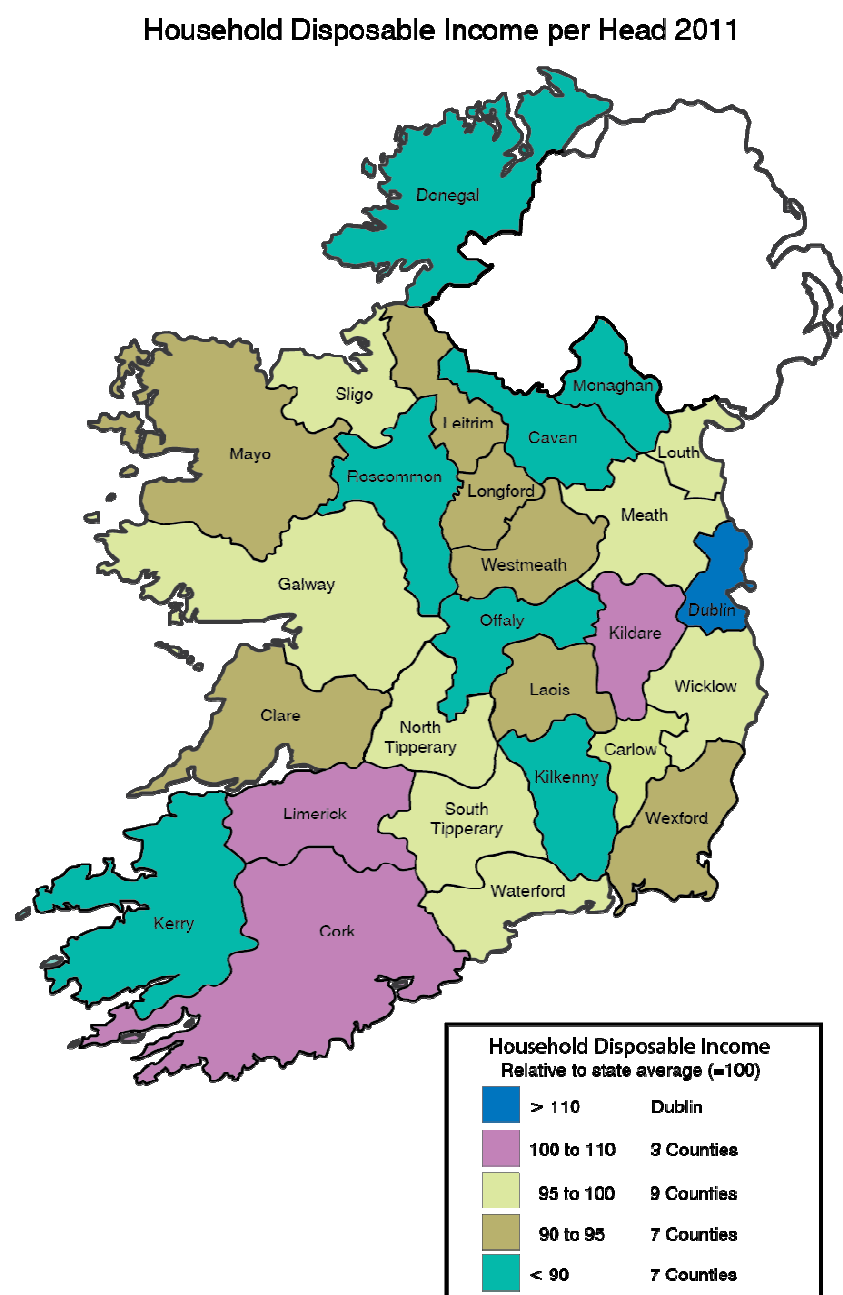
Household disposable income per head in 2011 was highest in Dublin (>10% higher than the State average) while, in the second tier of counties, Kildare, Limerick and Cork each had household disposable between 100 and 110 of the State average.

However, while household disposable income tends to be headline metric when the CSO data on county incomes are released, it is fair to say that this is not an accurate measure of *underlying income performance* and we need to look beneath the surface to shed more light on the true relative positions of counties.

¹¹⁸ In liaising with the Maynooth University staff, we are particularly grateful to Justin Gleeson for his support during the preparation of this part of the report.

¹¹⁹ The CSO's latest statistical release on county incomes (23 April 2014) is available at <http://www.cso.ie/en/releasesandpublications/er/cirgdp/countyincomesandregionalgdp2011/>.

Figure 7.1: Map of Household Disposable Income per Head in Irish Counties (2011)



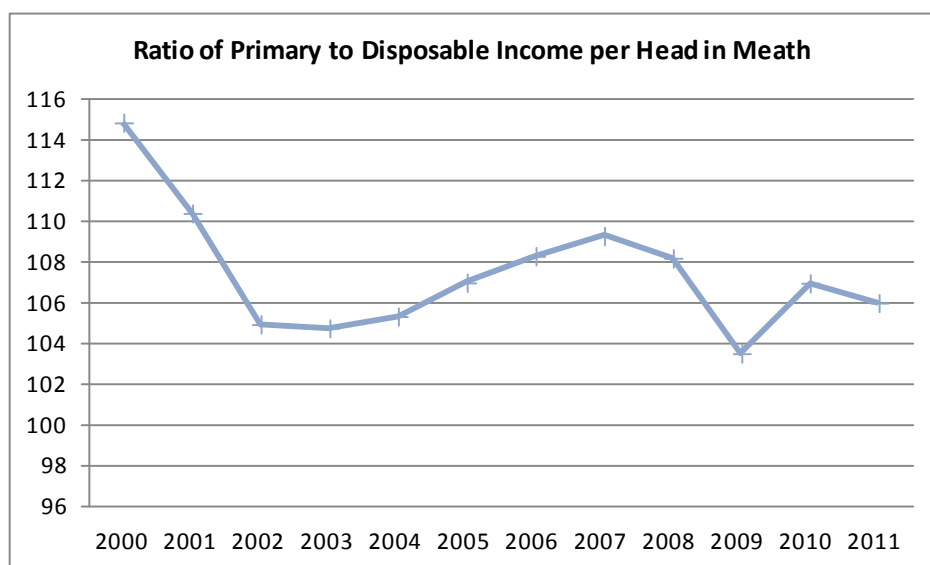
Source: CSO (*supra* footnote 119).

Primary Income per Head – A More Fundamental Indicator of County Income Performance

A more fundamental measure of county income performance is *primary income*, which includes employee income and income of self-employed persons.¹²⁰ Disposable income (to which the map above pertains) adjusts primary income by adding social welfare transfers and subtracting income taxes and social insurance contributions. According to the CSO data, in the counties of Dublin, Kildare, Meath and Wicklow, primary income exceeded disposable income in 2010 and 2011. These were also the counties with the highest employment rates as indicated in the results of the 2011 Census.

The relative sizes of primary income and disposable income is therefore an important indicator of underlying economic performance and the next chart below shows the ratio of primary to disposable income per head in Meath during 2000-2011. It is seen that primary income per head always exceeded disposable income per head during the period (the ratio is consistently greater than 100). However, it is also seen that the ratio has varied significantly during the years. During the last phase of economic expansion (2002-2007), which was based on an unsustainable property boom, primary income relative to disposable income grew strongly in Meath, but then fell sharply following the onset of the economic crisis (2007-2009). The analysis of the CSO data show that the ratio has recovered since 2009 and we would expect it to grow in the coming years as the economy upturn gains momentum.¹²¹

Figure 7.2: Ratio of Primary to Disposable Income per Head in County Meath (2000-2011)



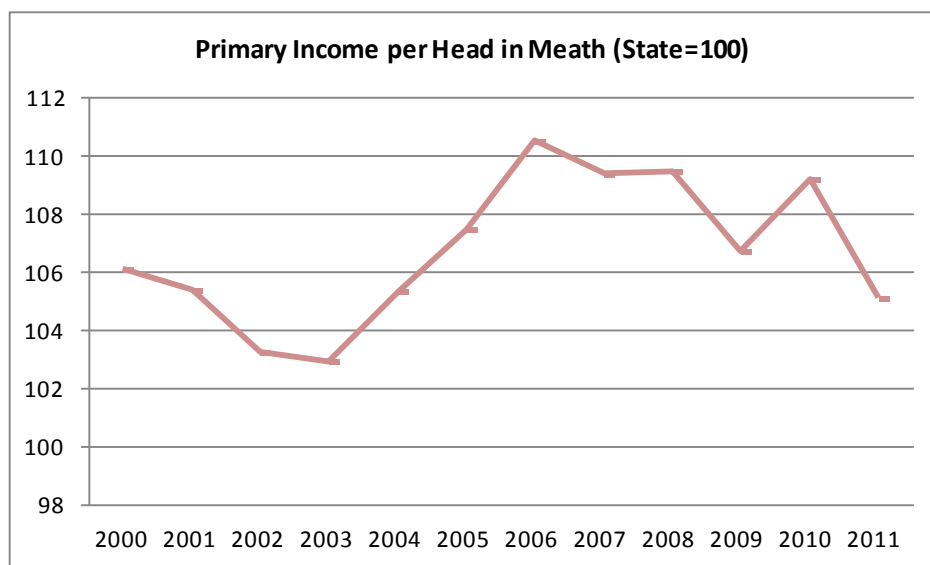
Source: CSO (*supra* footnote 119), consultancy team analysis.

¹²⁰ These are the principal components of primary income, which also includes rent of dwellings and net interest and dividends.

¹²¹ Figure A3 in the Annex (p. 286) shows the relatively strong performance of Meath in respect of the ratio of primary income to disposable income in 2011, where it ranks in the top echelon of counties by this income performance metric (along with Dublin, Kildare and Wicklow – the GDA).

In Figure 7.3 we compare primary income per head in Meath with that in the country as a whole during the period. It is seen that the ratio has always exceeded the value of 100, meaning that primary income per head has been higher in Meath compared with Ireland and thus that Meath has been a relatively prosperous part of the country (notwithstanding the variations observed in the ratio during the period).

Figure 7.3: Primary Income per Head in County Meath compared with Primary Income per Head in the State (2000-2011)



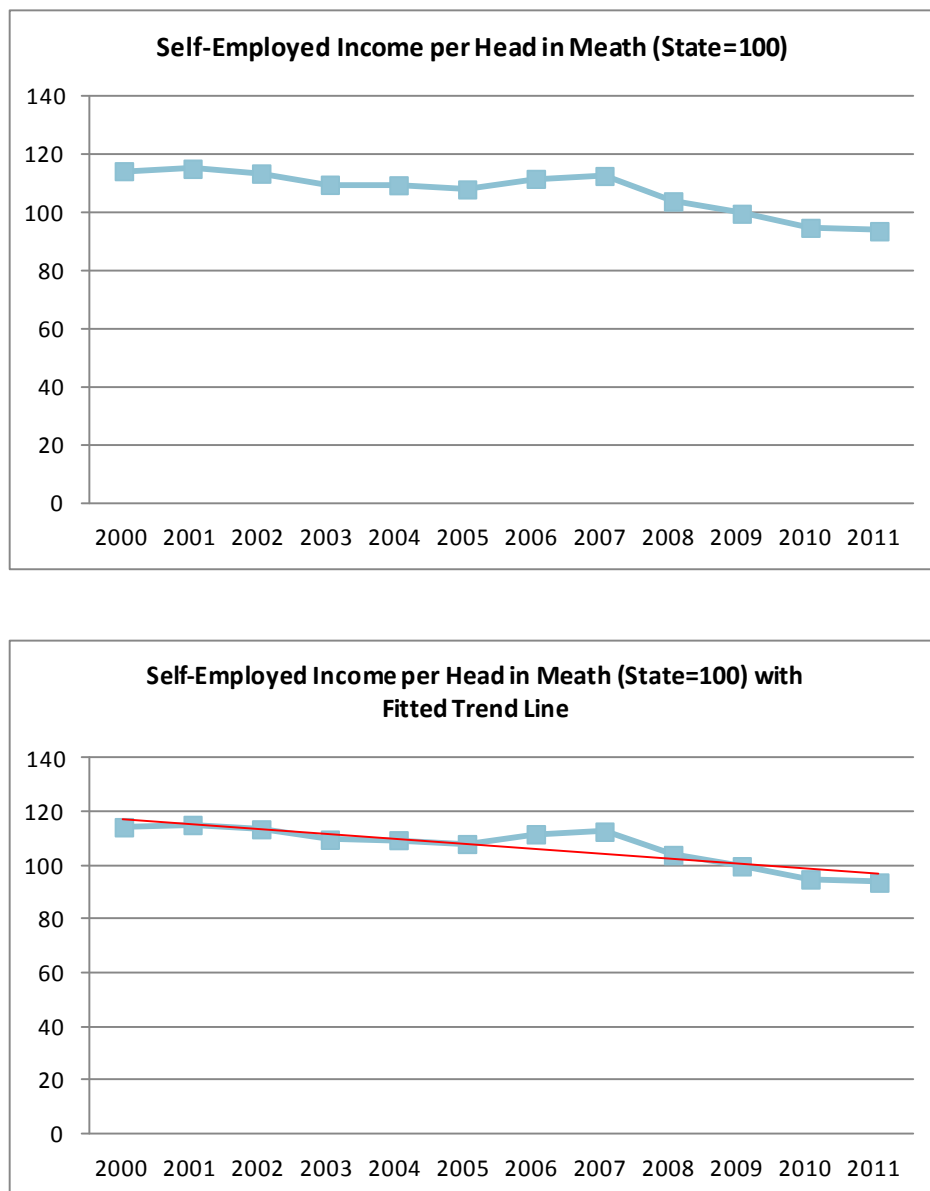
Source: CSO (*supra* footnote 119), consultancy team analysis.

Self-Employed Income

One of the principal components of primary income is *self-employed income*, which also gives indication of small business performance. The graph in Figure 7.4 overleaf shows that, 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. While the graph shows a slight upward trend in Meath's relative performance in the years immediately preceding the crisis (2005-2007), the data also indicate a clear enough downward trend in self-employed income per head in Meath compared with the country as a whole, which in turn suggests deterioration in the relative performance of the county's small businesses – not just in recent years, in the wake of the recession, but over the longer period since the beginning of the century (while this trend is fairly self-evident from the graph in the top panel of Figure 7.4, a fitted trend line is shown in the bottom panel to confirm the pattern).¹²²

¹²² Mindful of the possibility that the deteriorating trend in self-employed income per head in Meath relative to the State in Figure 7.4 may reflect the relatively rapid growth in population in Meath during the period, we have also considered the trends in self-employed income without adjusting for population. The graph in Figure A4 (p. 268) reveals that self-employed income grew more rapidly in Meath compared with the State during the last boom (2002-2007) (namely by 78% compared with 57%) but then declined more rapidly in Meath since the recession (namely by 40% compared with 30% during 2007-2011).

Figure 7.4: Income of Self-Employed per Head in County Meath compared with Income of Self-Employed per Head in the State (2000-2011) – Fitted Trend Line in Bottom Panel



Source: CSO (*supra* footnote 119), consultancy team analysis.

Summary of Review and Analysis of CSO County Income Data

The **positives** for County Meath are summarised as follows:

- ✓ County Meath is a fundamentally prosperous location in Ireland in which primary income exceeds disposable income (disposable income adjusts primary income by adding social welfare transfers and subtracting income tax and national insurance contributions).
- ✓ Meath is one of only four counties in Ireland in which primary income exceeded disposable income in 2010 and 2011 (the others being Dublin, Kildare and Wicklow).
- ✓ Meath was 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.

On the other hand, an **issue** for Meath concerns self-employed income:

- While self-employed income per head in Meath has exceeded that for the country as a whole in the past, since 2009 the position of Meath has fallen below that of the State and the position also reflects a longer-term deterioration (since 2000).

7.3 People Resources – People Residing in Meath

This section of the economic profile has regard to the following:

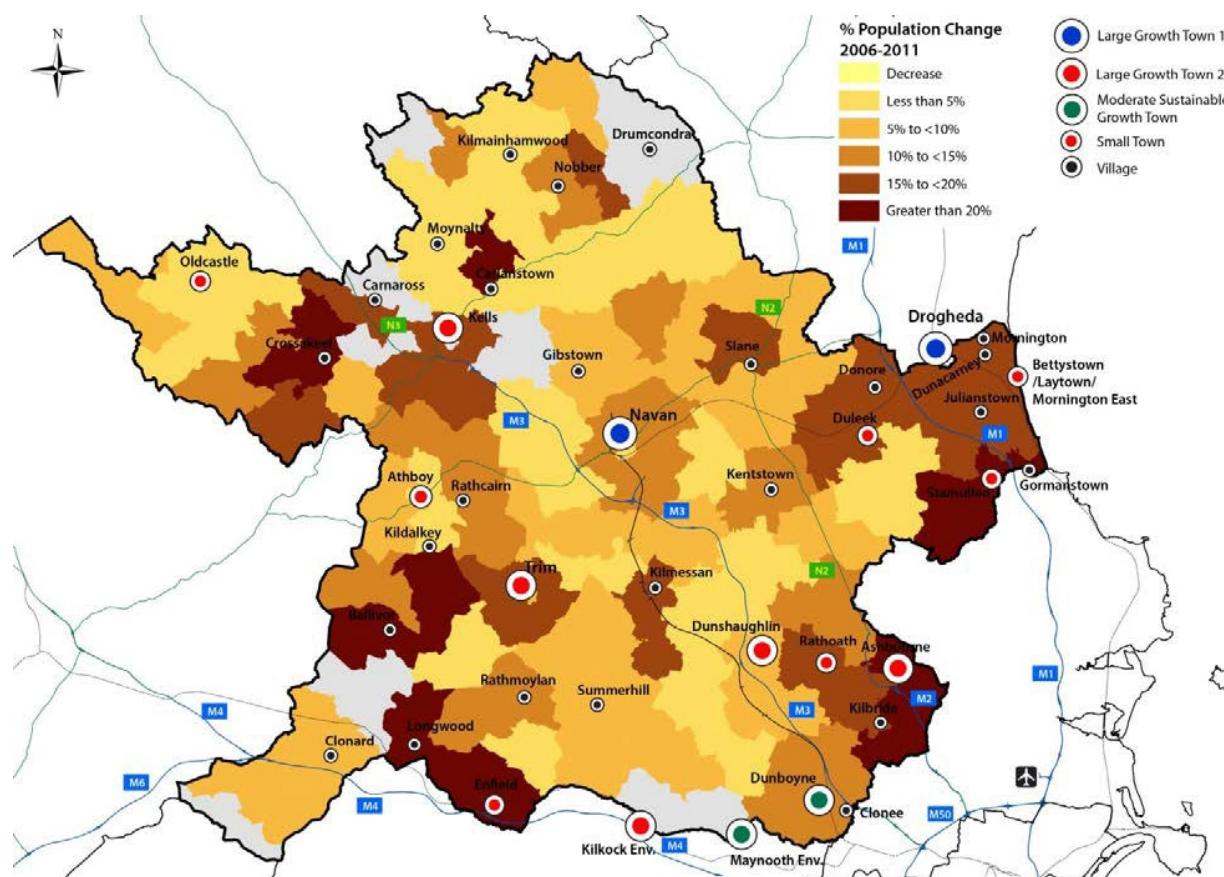
- Population and population change;
- Demographic structure;
- Employment performance (including unemployment);
- Deprivation/affluence and related indicators; and
- Educational attainment.

The analyses presented under each of the above headings pertain to the people residing in Meath and comparisons are drawn with Dublin, the Mid-East Region and the State.

Population and Population Change

In Census 2011, a total of 184,135 people were recorded as residing in County Meath, making it the seventh most populous local authority area in the country. The 2011 figure represents the highest level of population the county has attained since 1841, and the population level has grown strongly over the past century, especially in the past twenty years. Between the censuses in 2006 and 2011, Meath's population grew by 13.1%. This figure is higher than for the State (8.2%), the GDA (8.5%) and the Mid-East Region (11.7%).

The map in Figure 7.5 overleaf is reproduced from the Maynooth University economic baseline study (2013) and shows the distribution of population change between 2006 and 2011 among the electoral divisions (EDs) in Meath. The map reveals varied population change during the period, with strong growth observed on the border with Dublin, along the principal transport nodes (motorways) but also to the west of the county.

Figure 7.5: Map of Population Change among Electoral Divisions (EDs) in County Meath (2006-2011)

Source: Maynooth University economic baseline study of County Meath (2013).

Demographic Structure

Economically Active Persons

15-64 Years Age Group

Table 7.1 below shows that there were 121,347 persons aged between 15 and 64 years resident in Meath in 2011, meaning that 65.9% of the county's population were economically active in that year. However, the economically active rate was lower in Meath compared with Dublin (69.8%), the Mid-East Region (66.6%) and the State as a whole (67%). Of all the local authorities shown in the table, Meath had the lowest economically active rate in the last census year.

Table 7.1: Economically Active Persons in Meath and Selected Other Parts of Ireland (2011)

Geographic Area	2011	
	No. Persons 15-64	
	Years	% Total Population
Dublin	888,541	69.8%
Dublin City	381,093	72.2%
South Dublin	180,871	68.2%
Fingal	187,723	68.5%
Dún Laoghaire-Rathdown	138,854	67.3%
Mid-East	353,902	66.6%
Meath	121,347	65.9%
Kildare	142,088	67.6%
Wicklow	90,467	66.2%
State	3,073,269	67.0%

Source: CSO Census 2011 data, consultancy team analysis.

20-44 Years Age Group

Within the economically active population of a county, it is relevant to consider the age category 20-44 years in economic development strategy formulation because this cohort of people are likely to be still economically active in time periods specified by strategies (here 2014-2022 or six-year periods in LECs).

Table 7.2 reveals that Meath had a higher proportion of its residents in the 20-44 years group compared with the State in 2011 (i.e. 38.5% compared with 38.1%) but the rate in Meath was lower compared with Kildare (39.4%) and Dublin (42.6%).

Table 7.2: Persons Aged 20-44 Years in Meath and Selected Other Parts of Ireland (2011)

Geographic Area	2011	
	No. Persons 20-44	
	Years	% Total Population
Dublin	542,629	42.6%
Dublin City	243,496	46.2%
South Dublin	105,686	39.9%
Fingal	117,283	42.8%
Dún Laoghaire-Rathdown	76,164	36.9%
Mid-East	203,874	38.4%
Meath	70,831	38.5%
Kildare	83,502	39.7%
Wicklow	49,541	36.3%
State	1,747,371	38.1%

Source: CSO Census 2011 data, consultancy team analysis.

Dependency Rates

Also relevant to demographic analysis are dependency rates, which are generally defined as the proportions of the economically active population (i.e. aged between 15-64 years) accounted for by children (0-14 years) (*youth dependency rate*) and by older people (65+ years) (*old age dependency*). The *total dependency rate* is given as the sum of the youth and old age dependency rates.

The analysis presented in Table 7.3 shows that County Meath had a relatively high youth dependency rate (38.3%) in 2011. On the other hand, it had a comparably low old age dependency rate in that year (13.5%). However, the high youth dependency rate meant that the total dependency rate in Meath (51.7%) was the highest of the areas shown in the table. The high youth dependency rate is a potential strength for the county in the coming years as these young people will develop their human capital skills and hopefully as many as possible can be retained to live and work in the county.

Table 7.3: Dependency Rates in Meath and Selected Other Parts of Ireland (2011)

Geographic Area	2011					
	Youth Dependency		Old Age Dependency		Total Dependency	
	No. Persons 0-14 Years	% Persons 15-64 Years	No. Persons 65+ Years	% Persons 15-64 Years	Dependent Persons	% Persons 15-64 Years
Dublin	245,252	27.6%	139,276	15.7%	384,528	43.3%
Dublin City	80,029	21.0%	66,490	17.4%	146,519	38.4%
South Dublin	61,281	33.9%	23,053	12.7%	84,334	46.6%
Fingal	66,407	35.4%	19,861	10.6%	86,268	46.0%
Dún Laoghaire-Rathdown	37,535	27.0%	29,872	21.5%	67,407	48.5%
Mid-East	129,206	36.5%	47,979	13.6%	177,185	50.1%
Meath	46,466	38.3%	16,322	13.5%	62,788	51.7%
Kildare	51,568	36.3%	16,656	11.7%	68,224	48.0%
Wicklow	31,172	34.5%	15,001	16.6%	46,173	51.0%
State	979,590	31.9%	535,393	17.4%	1,514,983	49.3%

Source: CSO Census 2011 data, consultancy team analysis.

Ethnicity – Overseas Language Fluency among the Population

Ethnicity of the population is potentially important in helping to drive inward investment and jobs. This stems from our intelligence and insights on what FDI firms look for when considering Ireland as an investment location, in particular the availability of foreign language competencies among other skills of the workforce. From our consultations with FDI firms in Meath, we learned that strong emphasis is placed on 100% fluency on foreign languages where they are required (e.g. in respect of customer service operations or EMEA servicing, where African (Arabic) and Asian as well as European languages are sought). Often (but not exclusively), the firms will seek to employ foreign nationals whose first language or 'mother tongue' is the foreign language being sought rather than relying on indigenous workers who learned the foreign language at school/college (foreign nationals have an innate advantage in respect of appreciating the 'nuances' when speaking with customers in overseas locations).

With this in mind, we examined data on the number and proportion of non-national residents in Meath and other locations in Ireland, bearing in mind that these residents may not have third-level qualifications and/or may not be potential employees of inward investment firms.

According to the data analysis in Table 7.4, 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 good number of residents from Africa and Asia. However, compared with the other locations considered, including the country as a whole, the concentration of other nationalities in Meath is low (apart from Lithuanian residents). While this piece of analysis should not be considered definitive, the relatively low concentration of overseas nationals residing in Meath (totalling 6.7% in 2011) is in contrast to the corresponding concentrations in Dublin (10.4%) and Kildare (7.8%), and other parts of the State (7.2%). Put another way, a relatively high concentration in Meath may have some marketing potential for the county from an investment perspective.¹²³

Table 7.4: Number and Proportion of Non-Irish Residents in Meath and Selected Other Parts of Ireland (2011)

Geographic Area	Number of Residents (2011)						
	EU15 (excl. Ireland and	Lithuanian	Polish	Other	African	Asian	Total
	UK)			European			
Dublin	22,911	10,576	35,898	6,972	19,699	35,977	132,033
Mid-East	4,365	5,768	13,815	2,129	4,513	5,533	36,123
Meath	1,281	3,362	3,867	593	1,898	1,362	12,363
Kildare	1,641	1,558	7,194	1,141	2,143	2,674	16,351
Wicklow	1,443	848	2,754	395	472	1,497	7,409
State	48,280	36,683	122,585	16,307	41,642	65,579	331,076
% of All Residents (2011)							
Geographic Area	EU15 (excl. Ireland and	Lithuanian	Polish	Other	African	Asian	Total
	UK)			European			
	Dublin	1.8%	0.8%	2.8%	0.5%	1.5%	2.8%
Mid-East	0.8%	1.1%	2.6%	0.4%	0.8%	1.0%	6.8%
Meath	0.7%	1.8%	2.1%	0.3%	1.0%	0.7%	6.7%
Kildare	0.8%	0.7%	3.4%	0.5%	1.0%	1.3%	7.8%
Wicklow	1.1%	0.6%	2.0%	0.3%	0.3%	1.1%	5.4%
State	1.1%	0.8%	2.7%	0.4%	0.9%	1.4%	7.2%

Source: CSO Census 2011 data, consultancy team analysis.

Employment Performance

Labour Force Participation

The labour force is generally given as the sum of the unemployed and those at work. In the CSO's census data, the unemployed comprise two components, namely those (1) unemployed looking for their first regular job and (2) unemployed having lost or given up their previous job (the latter account for the vast majority of the unemployed). The labour force participation (LFT) rate is given as the ratio of the labour force to the population aged 15 years and above.

¹²³ Third-level educational among residents in Meath and the same locations is analysed below, where foreign languages are considered among the key subject areas.

Table 7.5 below provides a detailed analysis of labour force participation in County Meath, Dublin, the Mid-East Region and the State in the years 2006 and 2011. In the latest census year, Meath had the highest LFT rate (65.8%) in the Mid-East and only Fingal had a higher LFT rate in that year (68.4%). The LFT rate in Meath was appreciably higher than that in the country as a whole in 2011 (65.8% versus 61.9%). As may be expected, given the severity of the recession in the intervening years between the last two censuses, the LFP rates in 2011 were smaller than those in 2006 (apart from South Dublin, no change).

Table 7.5: Labour Force Participation in Meath and Selected Other Parts of Ireland (2006-2011)

Geographic Area	2011			2006			Change (2011-2006)		
	Labour Force	Persons 15+ Years	Labour Force Participation (LFP) Rate (%)	Labour Force	Persons 15+ Years	Labour Force Participation (LFP) Rate (%)	Labour Force	Persons 15+ Years	Labour Force Participation (LFP) Rate (%)
Dublin	652,178	1,027,817	63.5%	629,001	969,524	64.9%	23,177	58,293	-1.4%
Dublin City	279,128	447,583	62.4%	274,310	430,357	63.7%	4,818	17,226	-1.4%
South Dublin	98,561	168,726	58.4%	92,836	158,794	58.5%	5,725	9,932	0.0%
Fingal	141,916	207,584	68.4%	130,816	187,018	69.9%	11,100	20,566	-1.6%
Dún Laoghaire-Rathdown	132,573	203,924	65.0%	131,039	193,355	67.8%	1,534	10,569	-2.8%
Mid-East	260,441	401,881	64.8%	244,008	367,064	66.5%	16,433	34,817	-1.7%
Meath	90,634	137,669	65.8%	83,920	124,681	67.3%	6,714	12,988	-1.5%
Kildare	104,226	158,744	65.7%	97,719	143,326	68.2%	6,507	15,418	-2.5%
Wicklow	65,581	105,468	62.2%	62,369	99,057	63.0%	3,212	6,411	-0.8%
State	2,232,203	3,608,662	61.9%	2,109,498	3,375,399	62.5%	122,705	233,263	-0.6%

Source: CSO Census 2006 and 2011 data, consultancy team analysis.

Unemployment

The unemployment rate in the CSO's census data is defined as the number of people unemployed divided by the labour force, where, as already mentioned, the labour force is given as the sum of those at work and those unemployed.

Table 7.6 below shows that 16,292 residents of Meath were unemployed in 2011, giving an unemployment rate of 18% in that year. This was marginally higher than the rate observed in Kildare in that year (17.9%) and lower than the State as a whole (19%). However, compared with South Dublin (unemployment rate of 11.2%), the rate in Meath was much higher in 2011.

Looking back at 2006, which pre-dates the onset of the international financial crisis and major recession from the latter half of 2007, the unemployment rate in Meath was 6.5% in that year, notably lower than the country as a whole (8.5%) and lower compared with Dublin, apart from South Dublin, which had the lowest rate of unemployment in 2006 (5.4%). However, the last column of the table reveals that the rate of unemployment in Meath increased by over 11 percentage points during 2006-2011, compared with 10.5 points for the State and 8.2 in Dublin, indicating that the recession was badly felt in Meath.

Table 7.6: Unemployment in Meath and Selected Other Parts of Ireland (2006-2011)

Geographic Area	2011						2011					
	2011			2006			Change (2011-2006)			Change (2011-2006)		
	Labour Force	Unemployed	% Unemployed	Labour Force	Unemployed	% Unemployed	Labour Force	Unemployed	% Unemployed	Labour Force	Unemployed	% Unemployed
Dublin	652,178	111,449	17.1%	629,001	56,105	8.9%	23,177	55,344	8.2%			
Dublin City	279,128	51,699	18.5%	274,310	29,303	10.7%	4,818	22,396	7.8%			
South Dublin	98,561	11,071	11.2%	92,836	5,021	5.4%	5,725	6,050	5.8%			
Fingal	141,916	22,640	16.0%	130,816	10,022	7.7%	11,100	12,618	8.3%			
Dún Laoghaire-Rathdown	132,573	26,039	19.6%	131,039	11,759	9.0%	1,534	14,280	10.7%			
Mid-East	260,441	47,605	18.3%	244,008	16,664	6.8%	16,433	30,941	11.4%			
Meath	90,634	16,292	18.0%	83,920	5,483	6.5%	6,714	10,809	11.4%			
Kildare	104,226	18,639	17.9%	97,719	6,138	6.3%	6,507	12,501	11.6%			
Wicklow	65,581	12,674	19.3%	62,369	5,043	8.1%	3,212	7,631	11.2%			
State	2,232,203	424,843	19.0%	2,109,498	179,456	8.5%	122,705	245,387	10.5%			

Source: CSO Census 2006 and 2011 data, consultancy team analysis.

The Maynooth University economic baseline study (2013) reveals that, while the unemployment rate in Meath overall was lower compared with the State in the last census year (2011), there were some parts of the county that exhibited very high rates of unemployment. According to the Maynooth University study (p. 15):

“A move further to the west and north west details significantly higher unemployment rates. This is particularly evident in the main urban centres such as Kells Urban (38%), Navan Urban (29.9%), Athboy (25%) and Trim Urban (24.1%). More peripheral EDs with very high rates are Ardagh (30%), Ardnamullen (27%) and Oldcastle (26%). In total, 6 of the 92 Meath ED's (*sic.*) have unemployment rates in excess of 25%”.

Live Register Movements

While Census 2011 provides the latest estimates of the unemployment rate in Irish counties and EDs within counties (based on the International Labour Organization or ILO definition of unemployment), a lot has happened since that year and there has been a noticeable improvement in unemployment. For example, in April 2014, the seasonally adjusted standardised unemployment rate (SUR) in Ireland stood at 11.7%, down from 14.4% in April 2011, representing a 19% fall in the rate. Unfortunately, SUR data are unavailable for counties in Ireland and the latest available on joblessness at this level of geographical disaggregation are Live Register data. These data are not a definitive measure of unemployment because they include people in receipt of unemployment benefits who are also in part-time employment. Nevertheless, in the absence of other up-to-date data relating to unemployment at county level in Ireland, they are relevant to examine here and of particular interest is the *trend in the number of people on the Live Register*.

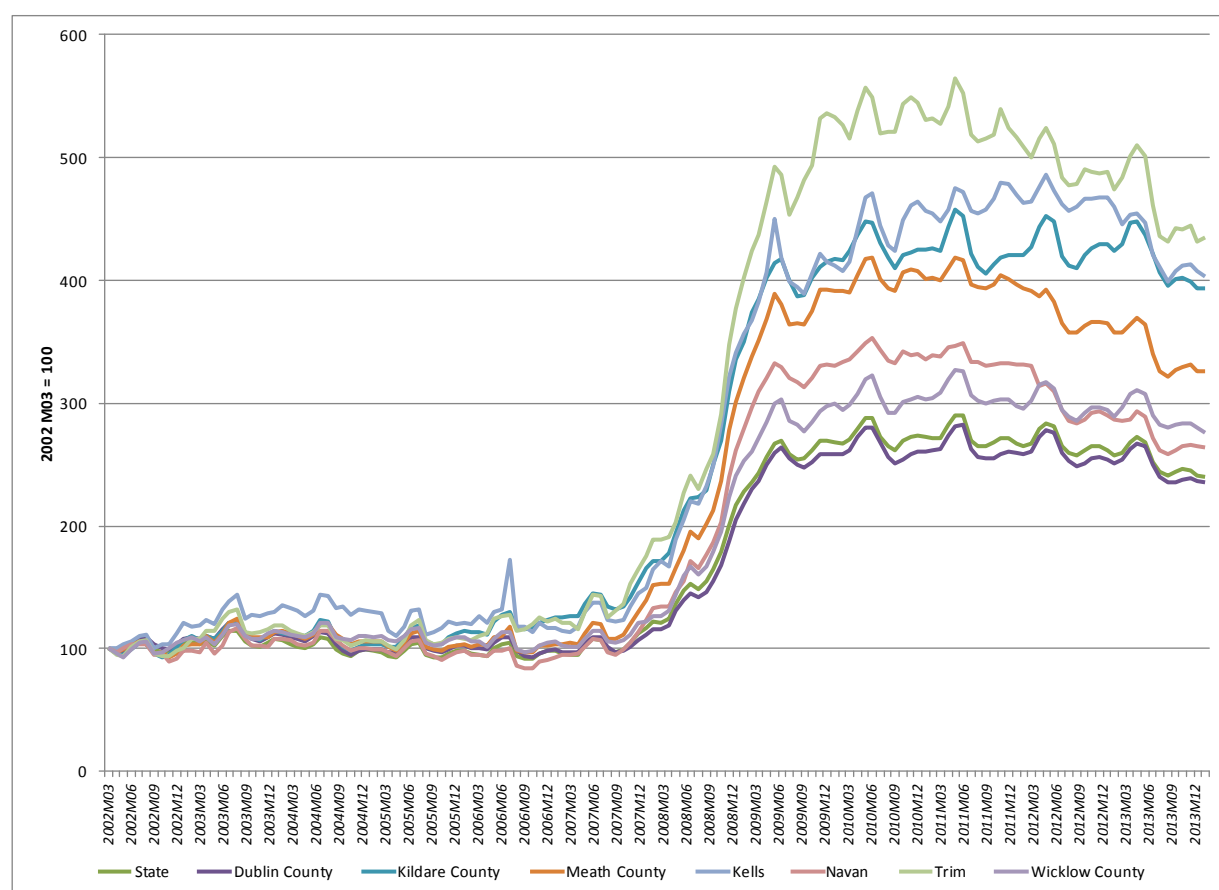
Figure 7.6 below charts the trends in the numbers of people on the Live Register in County Meath and the social welfare offices within Meath (namely Kells, Navan and Trim) plus Dublin, Kildare, Wicklow and the State during March 2002 to the same month in 2014. To aid the comparison, we have set the first month (March 2002) as the base month (equal to 100) and all subsequent months are relative to that month.

The graph reveals that the various locations have shown mixed developments in the number of people on the Live Register in recent years. Close inspection indicates that the number of people on the Live Register has fallen relatively rapidly in Meath since 2011 – a positive development for the county.

July 2011 was when the Live Register peaked countrywide, with over 470,000 signing on in that particular month. In that month, almost 113,000 were on the Live Register in Dublin (almost a quarter of the total), while 12,350 were on the Live Register in Meath, 19,592 in Kildare and 13,513 in Wicklow. Between then and the latest month at the time this part of our analysis was conducted (March 2014), the number of people on the Live Register fell by 22% in County Meath, which was the largest rate of decline among any of the counties examined (the corresponding falls in Dublin, Kildare and Wicklow were 16%, 14% and 16% respectively, and the decline countrywide was 17%). Within County Meath, the number of people on the Live Register fell by 24% in Navan Social Welfare Office, 23% in Trim Social Welfare Office and by 15% in Kells Social Welfare Office.

Thus, with the qualification that the Live Register is not definitive in respect of accurately measuring unemployment, the evidence nonetheless suggests that unemployment is easing in Meath.

Figure 7.6: Live Register Data in Meath County, Social Welfare Offices within Meath and Selected Other Parts of Ireland (March 2002-March 2014)



Source: CSO Live Register data, consultancy team analysis.

When in the process of finalising the drafting of this report, we considered more recent data on the Live Register movements in Meath and the other locations. The results of our data collation and analysis in this regard are shown in Table 7.7, where the period is from July 2013 to July 2014. As can be seen, and reflecting the economic recovery, the number of people on the Live Register has continued to fall during the past year – including in Meath, within which there have been comparably large falls in Kells and Trim.

Table 7.7: Live Register Data in Meath County, Social Welfare Offices within Meath and Selected Other Parts of Ireland (July 2013-July 2014)

County/Social Welfare Office	Live Register		
	Jul-13	Jul-14	% Change
Dublin County	107,055	98,935	-7.6%
Kildare County	19,209	17,599	-8.4%
Meath County	10,914	9,946	-8.9%
Kells	2,086	1,873	-10.2%
Navan	5,249	4,945	-5.8%
Trim	3,579	3,128	-12.6%
Wicklow County	12,842	11,981	-6.7%
State	441,976	404,515	-8.5%

Source: CSO Live Register data, consultancy team analysis.

Policy Responses to Unemployment – Nationally

Along with the public finances, competitiveness and financing SMEs, resolving the unemployment problem is one of the main goals of national economic policy now and in the coming years.

While the overall rate of unemployment is coming down rapidly and is projected to fall below 10% in the next couple of years by the government, it is generally accepted by economists that economic growth *by itself* will be insufficient to ensure the reduction and so policy needs to be proactive.¹²⁴ The main challenge relates to long-term unemployment (among which are a high proportion of youths out-of-work for a year or more) and addressing the structural problems of long-term and youth unemployment, which are closely related, will necessitate the implementation of a comprehensive set of initiatives aimed at streamlining the country's active labour market programmes (ALMPs) to ensure that they are closer to the labour market, meaning more effective alignment between the measures to assist those out of work and on welfare and the needs of employers.

Economic research has estimated that about two-thirds of public spending on ALMPs is allocated to interventions that are weakly associated with the labour market and only one-third to initiatives more closely aligned with employers' requirements.¹²⁵

¹²⁴ In July 2014, the seasonally adjusted unemployment rate in Ireland was the same as that in the EU28 (11.5%) (http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-29082014-AP/EN/3-29082014-AP-EN.PDF).

¹²⁵ O'Connell, P. (2013) 'Reforming Ireland's Labour Market Policy – Part 2', paper presented to Department of Finance Workshop on the Medium-Term Economic Strategy, 3 September 2013. This research broadly corresponds with estimates from the Department of Jobs, Enterprise and Innovation, which suggests that about 63% of public spending on ALMPs is on measures with 'weak' linkages to the labour market (e.g. general

In its Economic Survey of Ireland 2013, the OECD has recommended that decisive labour market policy interventions are needed. It proposed that the number of case-workers supporting long-term jobseekers should be increased through internal re-deployment and that a systematic evaluation of ALMPs should be undertaken (with the understanding that those shown to be ineffective or not working should be significantly reformed or scrapped). The OECD has also proposed that (the fiscally-limited) resources should be focused on policies empirically-proven to help regain employment (i.e. on those ALMPs closely aligned to the labour market or the needs of employers).¹²⁶

In its preliminary review of the Action Plan for Jobs, published earlier this year, the OECD observes that Ireland is on track to achieve the goals set out in the APJ – namely the creation of 10,000 new jobs by 2016 and restoring the number of people employed to 2 million by 2020, which was revised to 2.1 million in light of the publication of the government's MTES 2014-2020 in December 2013.¹²⁷ However, the OECD continues to emphasise the importance of maintaining a “relentless focus on activating those most vulnerable to alienation from the labour market” (p. 3) and to ensure that the APJ be “buttressed by strong labour activation policies” (p. 7) to address long-term and youth unemployment, and to combat the proportion of young people who are ‘not in education, employment or training’ (NEET rate).

In respect of reform of ALMPs recently introduced to tackle unemployment, the OECD highlights the Pathways to Work initiative (launched in 2012), which seeks to reform the benefits system, employment programmes and services for jobseekers and employers. The OECD also welcomes the reductions to the level and duration of unemployment benefits and the creation of ‘Intreo’ centres, designed to act as one-stop-shops to guide and assist the unemployed. The OECD's preliminary review puts emphasis on assisting the most disadvantaged in the labour market because they risk getting left behind as the recovery gains momentum and the OECD concludes by (*inter alia*):

- Welcoming the planned introduction of a youth guarantee scheme in Ireland – provided it is targeted at disadvantaged youths and other marginalised segments of the unemployed;
- Advising strengthening of the provision of training, especially for the disadvantaged – and ensuring a coordinated approach by SOLAS and the rollout of the Intreo offices;
- Highlighting that scarce resources are devoted to the most effective ALMPs – including reform of the long-established Community Employment Programme and continued focus on ensuring that the Pathways to Work strategy is effective in meeting the needs of the labour market;
- Developing a modern apprenticeship scheme.

In addition, the OECD also highlights the importance of improving the monitoring of the policy interventions in respect of tackling unemployment and enhancing the evidence of progress.

There are currently over 40 Intreo centres nationwide seeking to offer a one-stop-shop where jobseekers can get income supports and employment supports in the one place for the first time. There are Intreo centres in Navan and Drogheda but none in Kells and Trim (as at August 2014).

low-level education and training courses as opposed to more specific skills training in line with the requirements of the labour market).

¹²⁶ The OECD's 2013 survey report is available at <http://www.oecd.org/economy/economic-survey-ireland.htm>.

¹²⁷ The OECD's publication Ireland's *Action Plan for Jobs: a preliminary view* (2014) can be found at <http://www.enterprise.gov.ie/en/Publications/APJ-Preliminary-Review.pdf>.

Employment Patterns among Residents in Meath

We next turn our attention towards examining the composition of employment and trends therein in County Meath relative to Dublin (four local authority areas), the Mid-East Region and the State. In each case, our interest concerns distinguishing features of employment in Meath, which may present opportunities for targeting during the strategy period (2014-2022). The analysis is based on the last two censuses (2011 and 2006) and the broad industrial groupings provided by the CSO. It is important to note that the analysis pertains to employment among residents in any location; it therefore does not provide an accurate analysis of the local labour market in Meath (i.e. the number of jobs in Meath), which we carry out further below to extend our understanding of employment performance in Meath.

The data analysis presented in Table 7.8 below shows that 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%.¹²⁸ Closer inspection of the figures for Meath – in comparison with those for the other locations shown – 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 (however, we are also mindful of the traditional nature of manufacturing in the county and the need to attain more knowledge-oriented activities in manufacturing and services as part of the overall goal of broadening the economic base in Meath);
- Transport, storage and communications – reflecting Meath's favourable geographical location.

The table also suggests a higher proportion of employment among Meath residents in construction compared with the other locations, reflecting the continued (strong) growth in the population of the county, even during the recessionary years.

¹²⁸ As outlined earlier, there were 16,292 residents of Meath unemployed in 2011 (see Table 7.6, 127), meaning a total labour force of 90,634. The employment rate of 82% is given as the ratio of the 74,342 residents employed to the labour force in that year. The corresponding employment rates in Dublin, the Mid-East Region and the State were 82.9%, 81.7% and 81% respectively (for more details, see Table A2 in the Annex, p. 284).

Table 7.8: Composition of Employment in County Meath and Selected Other Parts of Ireland (2011)

Broad Industrial Group	2011 - Persons Aged 15 Years and Over at Work							
	Meath		Dublin		Mid-East		State	
	Number	%	Number	%	Number	%	Number	%
Agriculture, forestry and fishing	3,748	5.0%	2,949	0.5%	9,131	4.3%	94,247	5.2%
Mining, quarrying and turf production	748	1.0%	260	0.0%	1,171	0.6%	5,674	0.3%
Manufacturing industries	7,497	10.1%	36,790	6.8%	22,473	10.6%	193,080	10.7%
Electricity, gas and water supply	481	0.6%	4,257	0.8%	1,504	0.7%	13,116	0.7%
Construction	4,796	6.5%	18,610	3.4%	12,393	5.8%	90,357	5.0%
Wholesale and retail trade	11,836	15.9%	74,627	13.8%	33,749	15.9%	265,751	14.7%
Hotels and restaurants	3,462	4.7%	29,309	5.4%	10,318	4.8%	103,560	5.7%
Transport, storage and communications	5,241	7.0%	38,001	7.0%	12,487	5.9%	97,569	5.4%
Banking and financial services	3,966	5.3%	48,606	9.0%	12,181	5.7%	93,151	5.2%
Real estate, renting and business activities	6,863	9.2%	82,887	15.3%	21,614	10.2%	184,251	10.2%
Public administration and defence	4,978	6.7%	35,152	6.5%	14,431	6.8%	113,521	6.3%
Education	6,160	8.3%	47,528	8.8%	18,735	8.8%	163,728	9.1%
Health and social work	7,521	10.1%	59,885	11.1%	21,474	10.1%	203,379	11.3%
Other community, social and personal service activities	3,480	4.7%	28,927	5.3%	10,996	5.2%	84,665	4.7%
Industry not stated	3,565	4.8%	32,941	6.1%	10,179	4.8%	101,311	5.6%
Total	74,342	100.0%	540,729	100.0%	212,836	100.0%	1,807,360	100.0%

Source: CSO Census 2011 data, consultancy team analysis.

We can gain further insights into potential comparative advantages of Meath by sector by examining the degree of change during 2006-2011 in sectoral employment among Meath residents and those of the other locations.

Careful inspection of the analysis presented in Table 7.9 below – that is, those sectors in which employment among Meath residents has grown more rapidly compared with the other locations – further underscores the sectors in which the county appears to have a comparative advantage:

- In addition to agri-food, mining and quarrying, manufacturing and transport, storage and distribution, it is evident that Meath residents at work have skills and work experience in the following sectors (i.e. sectors in which employment among Meath residents has grown comparably strongly during 2006-2011);
 - 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.

Table 7.9: Change in the Composition of Employment in County Meath and Selected Other Parts of Ireland (2006-2011)

Broad Industrial Group	Change in Persons Aged 15 Years and Over at Work (Absolute and % Change)							
	Meath		Dublin		Mid-East		State	
	Number	% Change	Number	% Change	Number	% Change	Number	% Change
Agriculture, forestry and fishing	74	2.0%	-38	-1.3%	115	1.3%	4,970	5.6%
Mining, quarrying and turf production	-157	-17.3%	-85	-24.6%	-307	-20.8%	-2,077	-26.8%
Manufacturing industries	-2,653	-26.1%	-12,691	-25.6%	-7,195	-24.3%	-50,102	-20.6%
Electricity, gas and water supply	139	40.6%	882	26.1%	354	30.8%	1,826	16.2%
Construction	-6,214	-56.4%	-23,146	-55.4%	-16,064	-56.5%	-124,827	-58.0%
Wholesale and retail trade	883	8.1%	-246	-0.3%	2,098	6.6%	8,442	3.3%
Hotels and restaurants	527	18.0%	1,312	4.7%	711	7.4%	2,829	2.8%
Transport, storage and communications	267	5.4%	-3,261	-7.9%	-168	-1.3%	-8,136	-7.7%
Banking and financial services	543	15.9%	4,145	9.3%	1,489	13.9%	7,738	9.1%
Real estate, renting and business activities	254	3.8%	816	1.0%	600	2.9%	3,278	1.8%
Public administration and defence	643	14.8%	1,063	3.1%	1,297	9.9%	12,257	12.1%
Education	1,704	38.2%	10,894	29.7%	4,714	33.6%	36,252	28.4%
Health and social work	687	10.1%	4,682	8.5%	1,839	9.4%	12,160	6.4%
Other community, social and personal service activities	89	2.6%	1,488	5.4%	230	2.1%	4,307	5.4%
Industry not stated	-881	-19.8%	-17,982	-35.3%	-4,221	-29.3%	-31,599	-23.8%
Total	-4,095	-5.2%	-32,167	-5.6%	-14,508	-6.4%	-122,682	-6.4%

Source: CSO Censuses 2006 and 2011 data, consultancy team analysis.

Deprivation/Affluence and Related Indicators

Relative Index of Deprivation/Affluence

The Pobal Haase and Pratschke (HP) Deprivation Index is a method of measuring the relative affluence or disadvantage of a particular geographical area using census data. A scoring is given to the area based on a national average of zero and ranging from approximately -35 (being the most disadvantaged) to +35 (being the most affluent). The latest relative index focuses on the previous two censuses, 2006 and 2011, and is of relevance given the significant economic changes that have occurred during this period. The Pobal HP Deprivation Index for Meath is also commented on and mapped (at ED level) in the Maynooth University economic baseline study of 2013.

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 and 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. In sharp contrast, the four local authority areas making up Dublin all experienced growth in their relative affluence scores, as did Cork City, Galway City, Waterford City and Limerick City. As observed in the Maynooth University baseline economic study (p. 9):

“In general, cities have weathered the storm best with commuter areas such as Meath experiencing the most significant decline”.

The Maynooth University study also observes that the most disadvantaged EDs in Meath are Kells Urban (-12.1) and Kilmainham (-10.1), while the most affluent EDs are Rathoath (8.3), Kilbrew (7.5) and Dunboyne (6.6). Of the 92 EDs in Meath in 2011, 56 (61%) were found to be 'marginally below average' and 34 (37%) were 'marginal above average' in addition to the two most disadvantaged EDs just mentioned (2%).¹²⁹

We view the fall in Meath's relative affluence during 2006-2011 as further indication of the pro-cyclical nature of the local economy, where the economic performance of the county is driven to a large extent by that in Dublin.

Teagasc Index of the Economic Strength of Towns in Ireland

The relative deprivation of the Kells in the north of the county, according to the Pobal HP Deprivation Index, is also reflected in recent research carried out by Teagasc (2014), which ranks the economic strength of towns based on employment and emigration using 2011 census data: stronger towns are associated with lower unemployment and higher inward migration. The Teagasc research relates to towns with 1,500 or more residents in the 2011 Census.¹³⁰

The map reproduced in Figure 7.7 below shows a pattern of wide variation in the economic strength of towns assessed by Teagasc. Inspection of the map shows that the higher ranked towns tend to be located close to larger urban centres (e.g. the highest ranked town in the analysis is Bearna in County Galway, not far from Galway City). There is some relative strength in County Meath; yet also evidence of less strong performance in Meath towns in more peripheral locations in the county.

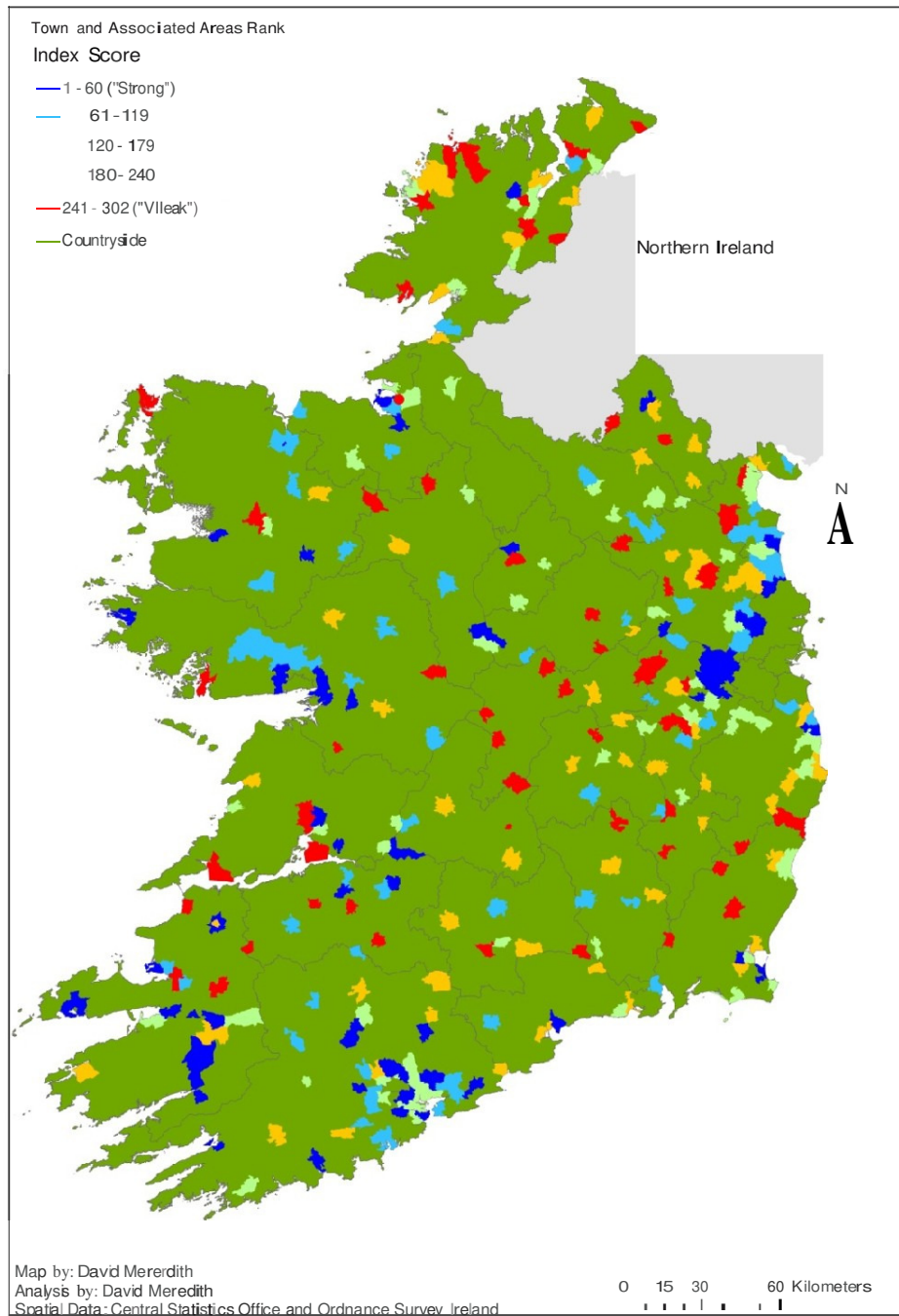
The ranking of Meath towns in the Teagasc study is as follows (index ranks in parentheses out of 302 towns ranked in total): Asbourne (25); Ratoath (31); Castlerickard (39); Stamullen (41); Enfield (65); Kilbrew (73); Trim (79); Dunboyne (88); Julianstown (119); Dunshaughlin (124); Ballivor (158); Slane (167); Kentstown (187); Duleek (192); Donaghpatrick (199); Ardbraccan (216); Ardcath (222); Kells (238); Enfield (241); Navan (An Uaimh) (264); Athboy (280); and Oldcastle (292).¹³¹

¹²⁹ Further information about the Pobal HP Deprivation Index and data are available at <https://www.pobal.ie/Pages/New-Measures.aspx>.

¹³⁰ The Teagasc research results are available at <http://www.teagasc.ie/publications/2014/3148/index.asp>.

¹³¹ As advised by Teagasc, duplications in the data (e.g. Enfield) are due to the inclusions of hinterlands as well as towns, with hinterlands attaining stronger ranks compared with town centres.

Figure 7.7: Map of Teagasc Index of the Economic Strength of Towns in Ireland (2011)- Ranks of the Towns Assessed



Source: Teagasc research of CSO SAPS 2011 data (*supra* footnote 130).

Note: Teagasc's research restricted to towns with 1,500 or more inhabitants in the 2011 Census.

Relative to the country as a whole (equal to 100), none of the towns considered in the Teagasc research were as strong as the national average (including the cities). The Meath towns were estimated to be 52% weaker than the national average (in terms of unemployment and migration patterns) and *so the map reproduced above should be carefully interpreted as pertaining to the ranks among the towns assessed and is not an accurate indicator of the absolute economic performance of towns across the country.* In the top-performing county (Sligo), towns there were found to be only 5% below the national average; in the least strongly performing county (Offaly), towns were estimated to be 151% below the national average.

Whatever about the merits or otherwise of this simple index of the economic strength of towns, the Teagasc research paper nevertheless provides some pointers regarding improving rural towns in Ireland (based on review of research conducted in other countries).

In particular, Teagasc proposes that an integrated stimulus programme targeted at small and medium towns be developed within the Rural Development Programme (RDP) and be delivered by LEADER. The structure of the programme would be multi-faceted with a focus on:

- Making towns more attractive to live in and visit;
- Making it easier to do business in towns;
- Increasing consumer demand and sentiment; and
- Improving access to finance among SMEs.

These objectives span central and local government, and they pertain to some of the most challenging economic problems facing the country. In outlining its proposals, Teagasc mentions targeted incentives to facilitate town/village renewal and refurbishment; considering the potential to make certain towns in certain parts of counties to be tourism hubs; encouraging events and festivals to enhance footfall; and working with enterprise training agencies to improve the skills and capacity of existing and new businesses. In terms of making it easier to do business in towns, Teagasc suggests moving as many fixed costs to a turnover basis for small start-up and vulnerable companies: for example, moving local authority rates to turnover for small start-up and vulnerable companies in stimulus towns for a limited time period. In respect of improving access to finance among SMEs, Teagasc proposes reforming the structure of funding small businesses by moving some of the existing grant-based funding mechanisms to loans or equity financing *via* local enterprise development funding. According to Teagasc, this would help to deal with displacement issues, enabling more existing businesses to be supported and also help to target existing gaps in working capital rather than just physical and human capital investments.

Report of the Commission for the Economic Development of Rural Areas

The Commission for the Economic Development of Rural Areas (CEDRA) was launched in October 2012 with the aim of carrying out an extensive public consultation on the future economic potential of rural Ireland and how best to channel funding and resources between 2013 and 2025. In April 2014, CEDRA published its Report of the Commission for the Economic Development of Rural Areas.¹³²

The CEDRA Report (2014) envisages that “Rural Ireland will become a dynamic, adaptable and outward looking multi-sectoral economy supporting vibrant, resilient and diverse communities experiencing a high quality of life with an energized relationship between rural and urban Ireland which will contribute to its sustainability for the benefit of society as a whole”.

¹³² <http://ruralireland.ie/index.php/cedra-reports>.

In setting out how this vision is to be achieved, the CEDRA Report contains a number of recommendations regarding governance and coordination (high-level) and more specific proposals, including:

- The facilitation of rural economic development zones (REDZs);
- Rural area FDI;
- Access and enabling supports.

In regard to the REDZs proposal, the CEDRA Report recommends the following:

- The piloting of a selected number of REDZs, to enhance the capacity for local communities to contribute to, and take ownership of, local economic development by creating local strategic economic development plans that will contribute to and align with local, regional and national economic development plans;
- In this context, local strategic economic development plans should identify and specify the needs and opportunities within a REDZ, identify those supports that both enterprise and labour require, and provide evidence to support their plan;
- As part of the proposed REDZs initiative, resources need to be made available to ensure effective implementation of the strategic plan – this should also include support for the development of community capacity with initiatives that develop skills in community leadership, governance, community development planning and rural economic development in order to support the participation of all communities in the preparation of local strategic economic development plans.

In other words, it is envisaged that the planning in respect of the proposed REDZs will be bottom-up, based on active community involvement in the process – aided by relevant resources to facilitate evidence gathering, planning and implementation.

Turning to the inward investment proposal, the CEDRA Report recommends that:

- IDA Ireland and Enterprise Ireland should jointly establish a new unit that will develop and pilot test an approach to attracting and intensively supporting small scale sector-appropriate FDI to small rural towns;
- The proposed unit should have a steering committee made up of representatives from IDA Ireland, Enterprise Ireland and a representative drawn from county managers (County and City Managers Association, CCMA).

In respect of access and enabling support, the CEDRA Report targets:

- The delivery of a minimum of 30 megabits per second (Mbps) of broadband to all rural areas by the end of 2015;
- For population centres of more than 1,500, and in the absence of commercial investment, further State investment should be used to support the deployment of fibre networks to these areas, enabling next generation speeds of 100Mbps as soon as possible and not 40Mbps, as is the current target – the aim being to ensure that smaller urban areas and rural towns are not at a disadvantage in attracting and retaining enterprises and employment compared to the principal urban areas;
- Allocation of transport funding towards specific improvements to local/regional roads of significant economic importance with prioritisation given to relief roads that have potential to open up economic and employment opportunities in key towns;

- Ongoing and comprehensive monitoring of the Rural Transport Programme (RTP) to ensure that it is meeting the transport needs of rural Ireland;
- Measures are put in place to ensure that adequate provision is made for the economic development needs of rural areas in the planning and delivery of water services infrastructure by Irish Water;
- An inter-departmental group to examine the needs and ways of implementing initiatives designed to improve access to finance by rurality-based enterprises (including in smaller towns) (e.g. micro loans for renewable energies, tourism and creative industry businesses, see funding for the general rural economy);
- Capacity building programmes to ensure skills acquisition and development among rural dwellers (in the context of Putting People First, 2012).

The CEDRA Report (2014) also contains sector-specific recommendations, namely:

- Food and beverages – support to facilitate product development and market growth (exporting) and a more streamlined approach to support towards the agri-food sector (e.g. Scotland Food and Drink);¹³³
- Creative industries – more integrated/streamlined approach to funding and other supports to rural enterprises active in the creative industries, which includes a large range of activities (arts, entertainment, multimedia etc.);
- Tourism and recreation – the provision of a research-based action plan for the development of tourism in rural areas;
- Marine/seafood – including the development of a plan-led set of actions to harness the potential of Ireland marine wealth, marine spatial planning and streamlining of marine licences (foreshore and aquaculture);
- Renewable energies – including the development of a national framework enabling the growth and development of rural businesses in this area.¹³⁴

¹³³ <http://www.scotlandfoodanddrink.org/>.

¹³⁴ Accompanying the main CEDRA report and list of recommendations is a substantial research report underpinning the conclusions and proposals, *Supra* footnote 132. A summary of the recommendations contained in the CEDRA report can be found in *The Irish Times* feature on the initiative (23 August 2014) '34 ways to improve Irish country life' (<http://www.irishtimes.com/life-and-style/34-ways-to-improve-irish-country-life-1.1905591>).

Box 7.1: State Investment in Growth and Recovery – Phase 4 Infrastructure Stimulus

On 13 May 2014, the Department of Public Expenditure and Reform announced exchequer funding of €200m towards new projects in a range of areas. This is the fourth such infrastructural stimulus and the projects will be funded from the proceeds of the sale of State assets (BGÉ and ESB). This may be a potential funding source for initiatives in Meath during 2014-2022.

Transport Programme: Department of Transport, Tourism and Sport (€50m)

An additional provision of €50m will allow for road surface improvements and a rural public transport initiative. Road improvements include the N22 Macroom Pavement Strengthening and the M11 Shankill-Bray South, some minor improvements such as the N71 Goggins Hill Improvement Scheme in Cork and the N77 Ballynasleee Realignment in Kilkenny. It will also allow for progression of the Athy Southern Distributor Road.

Social Housing Programme: Department of the Environment, Community and Local Government (€50m)

An additional allocation of €50m will allow the Department of Environment, Community and Local Government to increase social housing provision as follows: €20m on vacant units (800 units additional); €10m on capital projects largely directed to homelessness (c. 80) and €20m on Local Authority construction focused on highest need (c. 130 units).

Capital supports for the childcare sector: Department of Children and Youth Affairs (€5m)

Provision of an additional €5m will help to bolster the capital supports for the childcare sector programme. The types of works generally supported through this grant funding include: improvements to accessibility of services for children with disabilities; provision of natural outdoor spaces that promote active outdoor play; critical works to ensure that buildings are fit for purpose under the Childcare Regulations (open to community/not-for-profit services only); and small maintenance work to childcare facilities/outdoor play areas.

Commemorations programme: Department of Arts, Heritage and the Gaeltacht (€22m)

A sum of €22m will be provided towards the suite of Commemorations Projects. This will help to fund the 2015 costs associated with the 6 flagship Commemorations projects: the GPO Interpretive Centre; Kilmainham Courthouse and Gaol; Military Archives; Teach an Phiarsaigh, Ros Muc; Tenement Museum; Richmond Barracks. It will also fund the following projects which form part of the Commemorations programme: redevelopment works at the National Concert Hall; National Archives of Ireland Project (Phase 1); Yeats 2015; and the Irish Parliamentary Party Monument.

Greenways: Department of Transport, Tourism and Sport (€10m)

An additional €10m in 2014 will allow for further investment in cycling greenways, including the Dublin-Athlone-Galway route.

Lough Derg Development: Department of Transport, Tourism and Sport (€2m)

A provision of €2m will help to develop the tourism potential of Lough Derg, on the Shannon.

Páirc Uí Chaoimh: Department of Transport, Tourism and Sport (€30m)

Cork GAA are undertaking a €70m redevelopment of Páirc Uí Chaoimh along with the development of a centre of excellence including a full sized all weather training facility and establishment of a local marina park. A provision of €30m from the exchequer will help to progress this project with the balance (€40m) being funded by the GAA.

Pyrite Remediation: Department of the Environment, Community and Local Government (€20m)

The aim of the Pyrite Remediation Scheme is to procure the remediation of certain dwellings with damage caused by pyritic heave of hardcore under floor slabs. The Housing Agency will be responsible for the testing of dwellings and the implementation of the remediation process. They will also be the contracting authority for the scheme and will engage all necessary construction professionals, advisors and contractors to carry out the remediation of dwellings which are included in the Scheme.

Special Olympics Ireland HQ: OPW (€5m)

Funding of €5m would allow Special Olympics Ireland to consolidate their Dublin, Leinster and Eastern Region offices into a single new HQ office in the National Sports Campus (Abbotstown). This consolidation project will lead to significant annualised savings for the organisation.

Source: Department of Public Expenditure and Reform, consultancy team review.

New Regional Aid Map for Ireland – Kells Included as a New ‘Assisted Area’

The recent designation of Kells as an ‘Assisted Area’ in the new Regional Aid Map for Ireland (2014-2020) (approved by the European Commission on 21 June 2014) further illustrates the economic challenge facing the town and the northern environs of the county. On the other hand, this designation also reflects a unique and important opportunity for the town and its environs in north Meath in opening up significant new inward investment possibilities and in assisting the growth and developments of SMEs. We also see the Kells designation as an opportunity in raising Meath’s overall profile as an FDI location. As described below, Kells is already benefitting from new FDI (Box 7.2, p. 112).

The European Commission recently adopted guidelines on how EU Member States can grant investment aid to companies in order to support the development of disadvantaged regions in Europe between 2014 and 2020.¹³⁵ The new guidelines entered into force on 1 July 2014.

The Regional Aid Guidelines (RAGs) 2014-2020 were adopted after consultations with stakeholders (Member States, regional and local authorities, business associations, interest groups, individual companies and citizens) and with the European Parliament, the Committee of Regions and the European Economic and Social Committee.

As stated by the European Commission in its press release in respect of the RAGs 2014-2020, the guidelines adopt “a stricter approach on aid for investments made by large enterprises in the more developed assisted areas”.¹³⁶ According to the European Commission, evidence shows that large companies’ decisions to invest in a given region are prompted by factors such as the cost and availability of production factors (workforce, land, capital, etc.) and the general economic context (taxes, business environment), rather than by state aid. Therefore, aid to large enterprises in these areas will only be allowed for investments that bring “new economic activity, for initial investments for the diversification of existing establishments into new products or for new process innovation”, because it is more likely that these investments are carried out thanks to the subsidy, according to the European Commission. In the poorest regions of the EU (regions below 75% of average EU GDP), the guidelines continue to allow aid for other types of investments by large companies as well. In the outermost regions and sparsely populated areas, the possibility for Member States to grant operating aid to companies is maintained and simplified.

The new approved map showing the Assisted Areas in Ireland will provide for the following:¹³⁷

- The inclusion of new areas – including Kells – meaning that the new map for 2014-2020 will see a larger geographical coverage compared with the previous (2007-2013) map;
- Aid to large enterprises is permitted for new economic activities, expansions which involve new products or services, and product innovation; and
- Maximum aid intensity rates of 30% for small enterprises, 20% for medium enterprises and 10% for large enterprises are maintained at current levels (‘c’ area status, which is the same designation that the European Commission has approved for the UK, also on 21 June 2014).

The detail of the Kells and environs EDs included in the new EU Regional Aid Map 2014-2020 are illustrated in Figure 7.8 below (see also the overall Irish map presented earlier in Figure 5.1, p. 69).

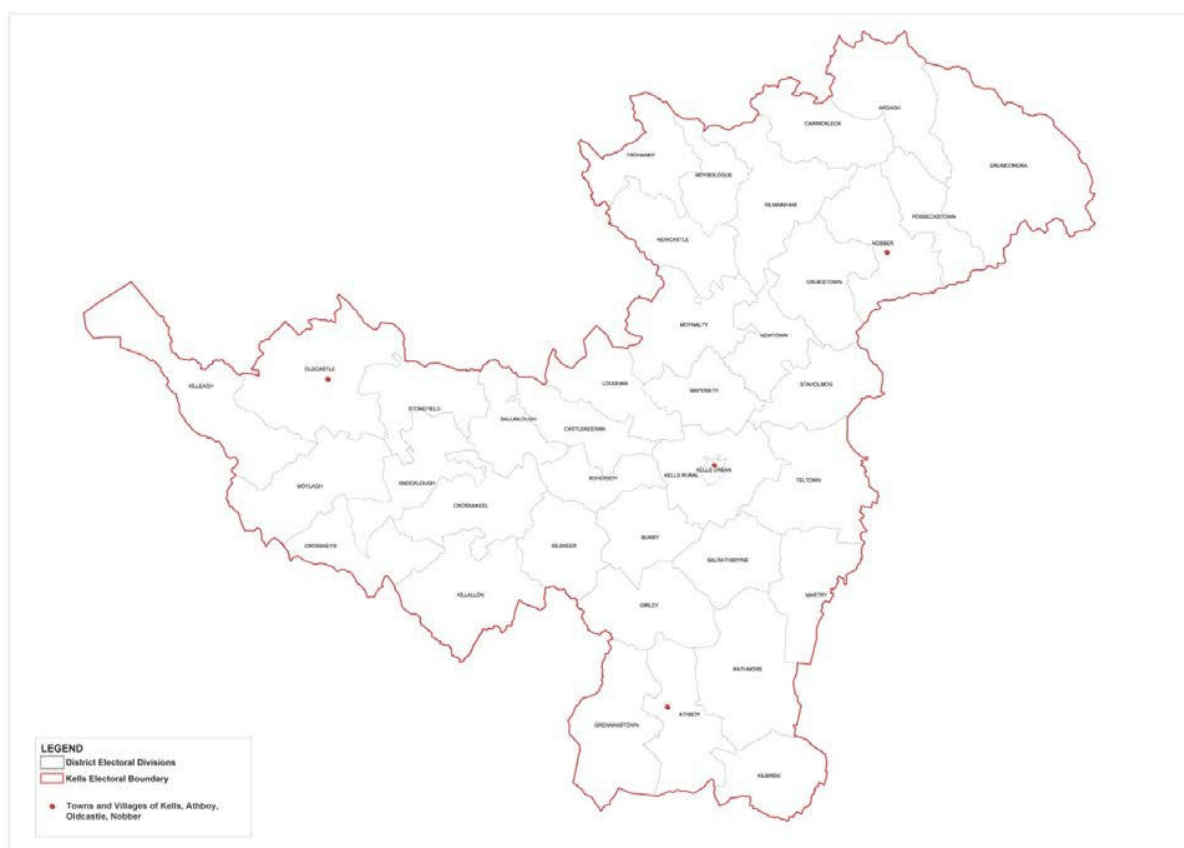
¹³⁵ See http://ec.europa.eu/competition/state_aid/regional_aid/regional_aid.html.

¹³⁶ http://europa.eu/rapid/press-release_IP-13-569_en.htm.

¹³⁷ <http://www.merrionstreet.ie/index.php/2014/04/new-regional-aid-map-increases-areas-for-investment-aid-to-business-bruton/>.

As mentioned earlier in our commentary of the new map in Section 2, the aid will include EI and IDA Ireland grants – Irish and foreign firms. The aid will also include tourism grants, urban and rural renewal incentives. The new source of aid will include capital and employment grants subject to the aforementioned limits for small, medium and large firms (30%, 20% and 10%). While the design of the aid is directed towards micro, small and medium firms, larger firms are also eligible, where the rules specific that large-firm aid should be directed at new activities, diversification of existing firms into new products or process innovation.

Figure 7.8: Map of the Electoral Divisions in Kells and Elsewhere in Meath Included in the New EU Regional Aid Map 2014-2020



Source: Map prepared by Meath County Council (after notification of the new map from the Department of Jobs, Enterprise and Innovation, DJEI, consultancy team review and analysis).

Note: The EDs in Meath included in the new map are as follows: Kells Rural; Athboy; Oldcastle; Kells Urban; Drumcondra; Grennanstown; Rathmore; Newtown; Teltown; Kilmainham; Nobber; Ardagh; Martry; Moynalty; Balrathboyne; Maperath; Carrickleck; Castlekeeran; Crossakeel; Kilbride; Moylagh; Newcastle; Staholmog; Loughan; Kilskeer; Girley; Killeagh; Cruicetown; Trohanny; Crosskeys; Boherboy; Killallon; Burry; Moybolgue; Stonefield; Ballinlough; Knocklough; Posseckstown.

Table 7.10 below shows the population in 2011 of each of the 38 EDs in Meath now included in the EU Regional Aid Map 2014-2020. An appreciably large population of almost 29,000 is covered by the new aid, which includes Kells and other important settlement areas in the north of the county, which are home to some important indigenous businesses.

Table 7.10: Population (2011) of the Electoral Divisions in Kells and Elsewhere in Meath Included in the New EU Regional Aid Map 2014-2020

Kells Electoral Districts - EU Regional Aid Map 2014-2020			
Electoral Division	Pop (2011)	Electoral Division	Pop (2011)
1 Kells Rural	4,468	21 Moylagh	416
2 Athboy	2,531	22 Newcastle	409
3 Oldcastle	2,324	23 Staholmog	405
4 Kells Urban	2,003	24 Loughan	405
5 Drumcondra	1,290	25 Kilskeer	387
6 Grennanstown	1,201	26 Girley	386
7 Rathmore	970	27 Killeagh	382
8 Newtown	886	28 Cruicetown	366
9 Teltown	886	29 Trohanny	328
10 Kilmainham	761	30 Crosskeys	323
11 Nobber	748	31 Boherboy	297
12 Ardagh	680	32 Killallon	270
13 Martry	663	33 Burry	266
14 Moynalty	609	34 Moybolgue	241
15 Balrathboyne	500	35 Stonefield	237
16 Maperath	479	36 Ballinlough	223
17 Carrickleck	473	37 Knocklough	216
18 Castlekeeran	466	38 Posseckstown	198
19 Crossakeel	465		
20 Kilbride	450		
Total Population		28,608	

Source: DJEI, CSO and consultancy team analysis.

Note: See also Figure 7.8 above.

Box 7.2: New Inward Investment Announced for Kells (August 2014)

While Kells and its surrounding area in the north of Meath may have felt the impact of the downturn more than most locations, there are grounds for optimism in the coming years – not least in view of the new Regional Aid Map for the EU 2014-2020, which includes Kells and its hinterland as eligible for enhanced funding to promote investment, enterprise development and jobs.

On 28 August 2014, Meath County Council issued a press release in which it warmly welcomed the announcement of 50 new jobs to be created at the Kells Enterprise Centre.

US based SWG and MDS Global Technologies are to set up in the centre and create 25 jobs each over the next two years with support from the SmartStart accelerator programme, which provides advice and mentoring to help grow businesses and facilitate investment.

Jackie Maguire, the Council's Chief Executive said *"We are delighted to welcome these companies to Kells and to County Meath. The Council has worked hard to attract this type of investment to the County and it is very encouraging to see that US based companies recognise the advantages that we offer, and have the confidence to set up in north Meath. The investment we have made in recent years in improving our infrastructure is paying off and it is reassuring that Meath is now becoming recognised internationally as a good place to do business."*

The Council's Director of Planning, Community and Enterprise, Kevin Stewart, also welcomed the announcement and said *"We have worked very closely with SmartStart to help them to secure this investment for Kells. I would like to congratulate them on their achievement and thank them for choosing Kells as a location. The Kells Enterprise Centre, and north Meath generally, is a first class business location and I look forward to more of these positive announcements over the coming months."*

SWG, a Philadelphia based company, works with customers to grow their telecommunications networks, re-purpose, re-use and recycle their existing telecommunications equipment. The SmartStart programme provided a landing pad and interim Chief Executive for the company as well as access to established agency relationships within Ireland. The company is set to create 25 jobs as part of this announcement.

MDS Global Technologies transports intellectual (IP) data using existing infrastructure and networks at a significantly higher rate than other providers. A US based company, MDS will locate all Global sales and technical support functions in Kells Enterprise Technology Centre, Meath creating 25 jobs. SmartStart has mentored MDS for over two years in business development, corporate structure and Angel-led seed funding.

Source: Meath County Council, consultancy team review.

Educational Attainment

Third-Level Educational Attainment

Generally speaking, there is no more important driver of economic development and jobs than education. Having a good grounding at primary- and secondary-level is fundamentally important to one's subsequent educational attainment, where at third-level employers are increasingly seeking qualifications and skills in a number of subject areas germane to the country's comparative economic strengths, namely:

- Humanities, including foreign languages – internationally-traded services;
- Social sciences, business and law – internationally-traded services and domestically-traded services;
- Science, mathematics and computing, which includes life and physical sciences, and statistics – IT (especially software), life sciences, innovation, manufacturing;
- Engineering, manufacturing and construction – manufacturing, innovation etc.

More and more in the media, it appears, employers and industry commentators are observing a trend of skills shortages in these key areas. On 9 May 2014, the Expert Group on Future Skills Needs (EGFSN) published its fourth Vacancy Overview report, which outlines the areas where job vacancies arose during 2013.¹³⁸ The continued demand for IT professionals is evident throughout the report. The report also found an increased number of difficult-to-fill mentions for IT posts along with professional occupations in areas such as engineering, science, health and business.

In addition to the subject areas listed above, the category ‘personal services’ is also important to Ireland’s, and Meath’s, economic development. This category comprises (a) hotel, restaurant and catering, (b) hair and beauty services and (c) other personal services (the first sub-group being the largest in terms of the number of participants in third-level courses). Personal services are important in underpinning the success of tourism and the third-level courses within this category are noteworthy for being entrepreneurial and practical in content, reflecting the fact that many activities within the personal services sector are competitive and characterised by low barriers to entry (many people graduating with qualifications in personal services go on to eventually set up their own businesses and create employment).

All Key Subject Areas at Third-Level

In the next series of graphs (Figure 7.9-Figure 7.14), the CSO data analysed pertain to third-level or higher educational qualifications attained after completing two or more years of study, and correspond with the tertiary qualifications provided for in the National Framework of Qualifications (NFQ): that is, NFQ Level 6 (advanced certificates and higher certificates), Level 7 (ordinary or non-honours bachelor degrees), Level 8 (honours bachelor degrees), Level 9 (master degrees) and Level 10 (PhD/doctoral degrees) or their equivalents (qualifications obtained in other jurisdictions).¹³⁹

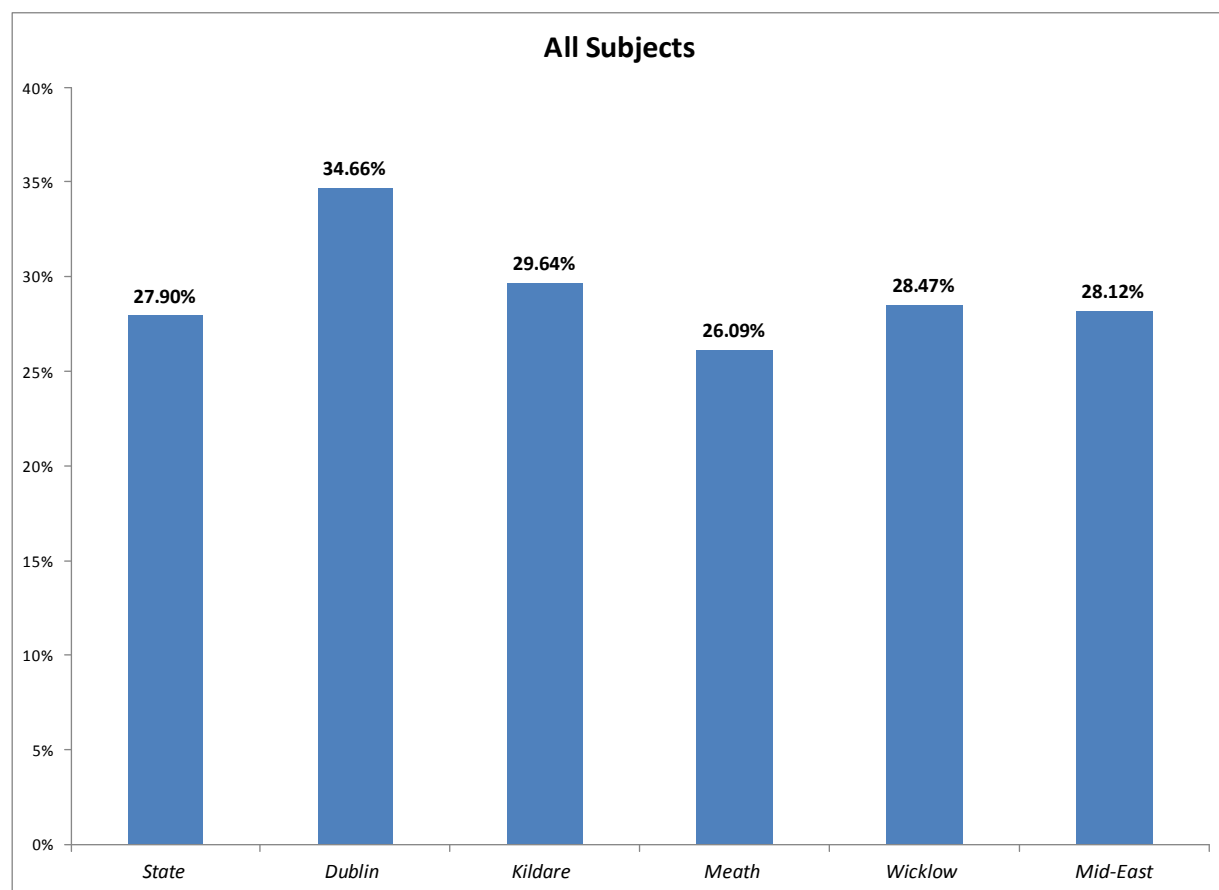
Figure 7.9 below reveals that the proportion of residents *aged 15 years or more* with third-level or higher educational qualifications in any subject area in 2011 was lower in County Meath (26%) than the State (28%), Dublin (35%), Kildare (27%) and Wicklow (28%). The subsequent series of graphs look at the relative position of Meath in the key subject areas listed above.¹⁴⁰

¹³⁸ <http://www.skillsireland.ie/publications/2014/title,12212,en.php>.

¹³⁹ The 10-level NFQ chart is reproduced in Figure A5 (p. 285).

¹⁴⁰ Figure A6-Figure A11 (pp. 286-291) in the Annex at the end of the report present the corresponding graphs where the denominator in each location is *all residents*. The graphs presented here (Figure 7.9-Figure 7.14) are designed to avoid the risk that some of the locations may have a relatively large number of residents aged 0-14 years. Nevertheless, the same patterns are evident here as in the tables presented in the Annex – namely one in which the extent of third-level or higher educational attainment is lower in Meath compared with the other locations.

Figure 7.9: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas



Source: CSO Census 2011 data, consultancy team analysis.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A6 (p. 273) for the corresponding graph where the denominator is all residents in each location.

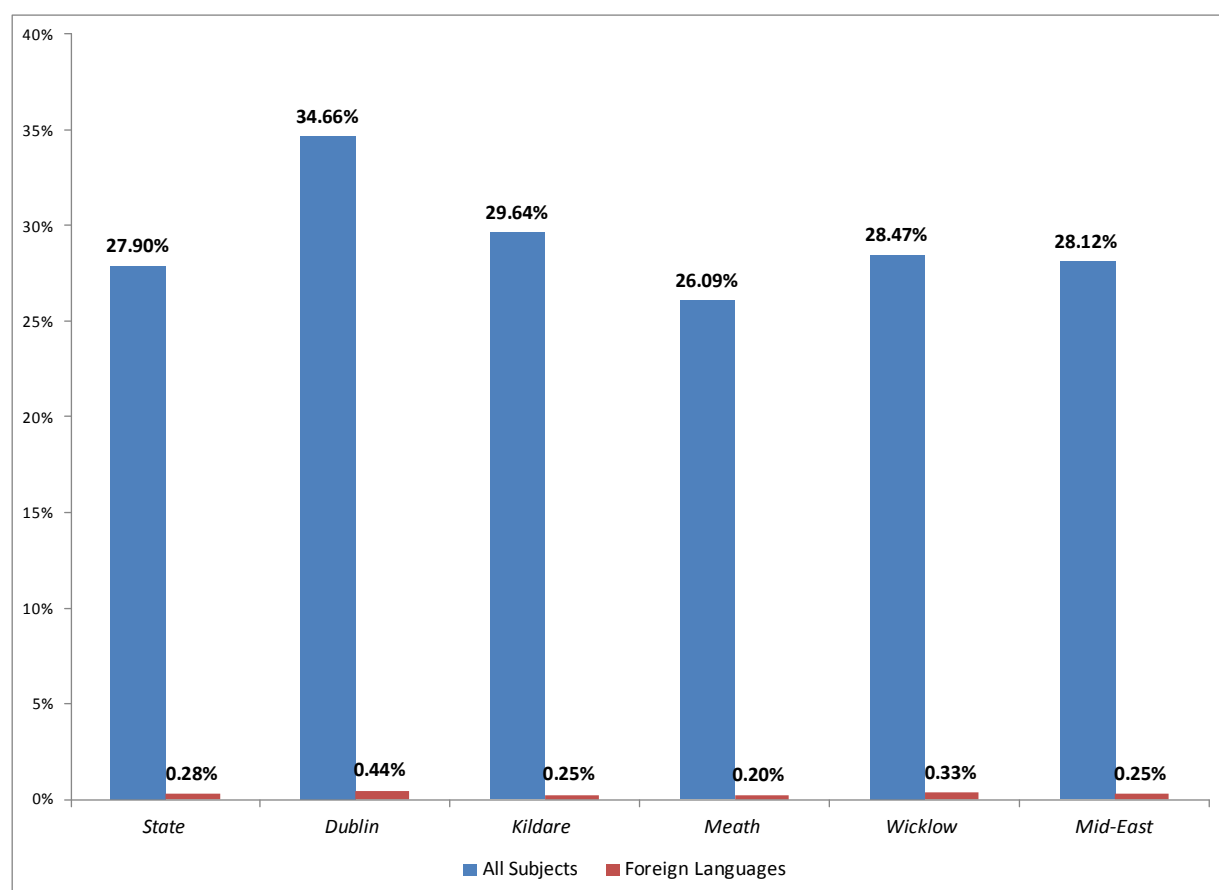
Foreign Languages at Third-Level

Figure 7.10 looks at third-level or higher educational attainment in foreign languages and compares the situation in this subject area with that of all subject areas. What is striking about the graph is that foreign languages account for a very low share (less than 0.1%) of all third-level or higher educational attainment in Ireland, illustrating commentary by employers and others in the media that there appears to be a deficit in foreign language skills in the country (the low share attributed to foreign languages is also evident when the shares of the other subject areas are observed below).¹⁴¹

¹⁴¹ The deficit in foreign language skills is evident in NI as well as Ireland (see for example the recent survey of businesses carried out by InterTradeIreland, in its Business Monitor Q1 2014, available at http://www.intertradeireland.com/researchandpublications/business_monitor/).

The graph also shows that third-level or higher educational attainment in foreign languages was lower among Meath residents compared with the other geographic areas considered, including the State.

Figure 7.10: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas and Foreign Languages



Source: CSO Census 2011 data, consultancy team analysis.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A7 (p. 274) for the corresponding graph where the denominator is all residents in each location.

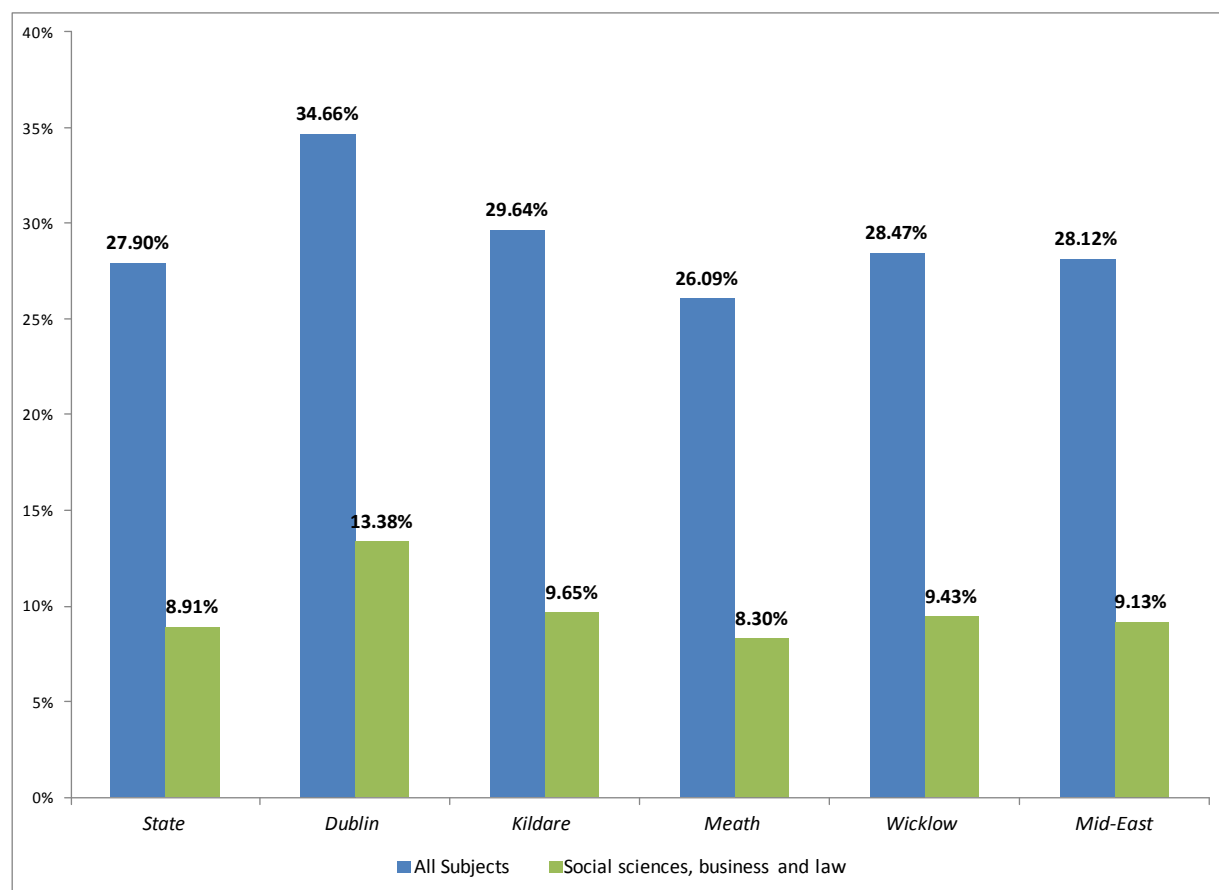
Social Sciences, Business and Law

This group of third-level subjects comprises a range of disciplines that are widely sought by foreign and indigenous companies, including business and administration, marketing and advertising, accounting and taxation, management and administration, and law.¹⁴²

¹⁴² Sales and marketing is a skill apparently in short supply in Ireland – according to our consultations with senior business people in Meath (see also the recent InterTradeIreland research, *supra* footnote 141).

It is evident from Figure 7.11 below that Meath's performance in respect of social sciences, business and law is lower compared with the other regions: the proportion of residents aged 15 years or more with third-level or higher qualifications in these subjects in 2011 was 8.3% in Meath, compared with 13.4% in Dublin, 9.7% in Kildare, 9.4% Wicklow and 8.9% in the country as a whole.

Figure 7.11: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas and Social Sciences, Business and Law



Source: CSO Census 2011 data, consultancy team analysis.

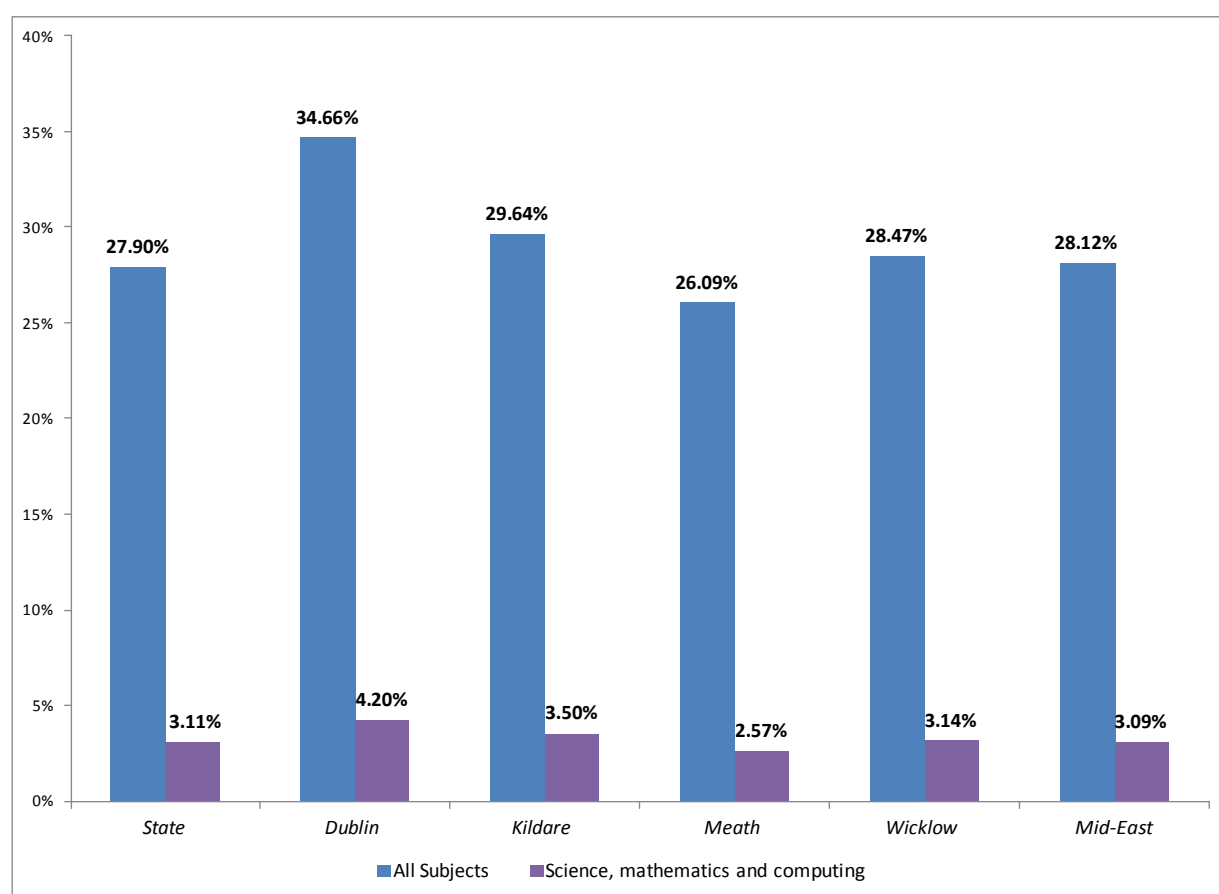
Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A8 (p.275) for the corresponding graph where the denominator is all residents in each location.

Science, Mathematics and Computing

This group of subjects includes biology and biochemistry, physical sciences (physics, chemistry, earth science), computer science, computer use and other science, mathematics and computing courses. These subjects are important for Ireland's life sciences and pharmaceutical sectors and for the country's burgeoning IT sector (particularly software), which has grown especially rapidly in recent years and which contributes the most to Ireland's export performance

Figure 7.12 below shows that the proportion of students engaged in these subjects is relatively low, which raises a general question about participation in these subjects more generally in Ireland. It is also seen that the proportion of residents aged 15 years or more with third-level or higher educational qualifications in science, mathematics and computing is lower in Meath (2.6%) compared with the other locations – Dublin (4.2%), Kildare (3.5%), Wicklow (3.1%) and the State (3.1%).

Figure 7.12: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas and Science, Mathematics and Computing



Source: CSO Census 2011 data, consultancy team analysis.

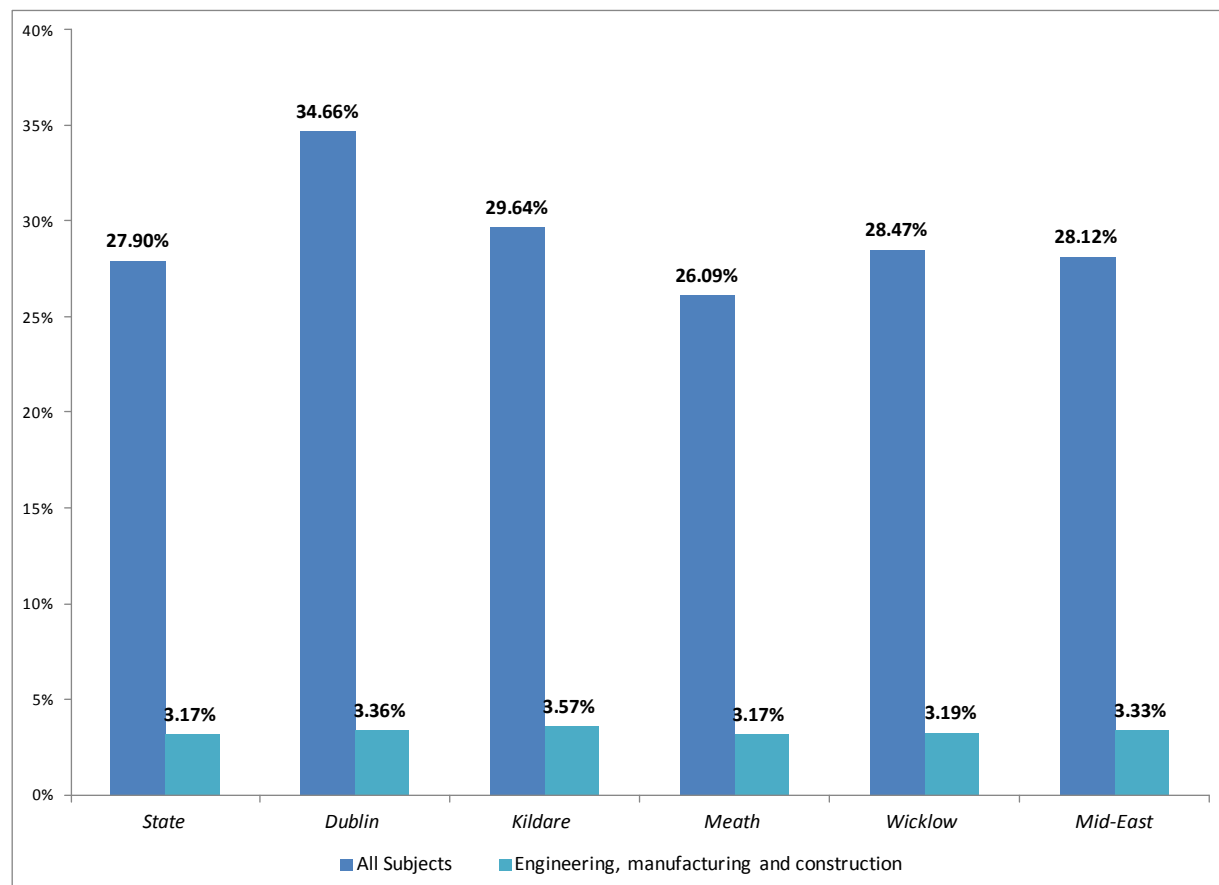
Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A9 (p. 276) for the corresponding graph where the denominator is all residents in each location.

Engineering, Manufacturing and Construction

This is another key technical area of educational performance and the category includes engineering and engineering trades (civil, industrial, mechanical, chemical, electronic engineering etc.), mechanics and metalwork, electricity and energy, architecture and town planning, and construction. Qualifications and skills in these subject are important to design and innovation. Like the previous category of subjects (science, mathematics and computing), third-level or higher educational attainment in engineering, manufacturing and construction is comparably low and this reflects a broader challenge for Ireland in respect of growing student interest in STEM subjects (science, technology, engineering and mathematics).

Once more, the proportion of residents with third-level or higher educational qualifications in this subject area is lower in Meath compared with the other locations (Figure 7.13).

Figure 7.13: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas and Engineering, Manufacturing and Construction



Source: CSO Census 2011 data, consultancy team analysis.

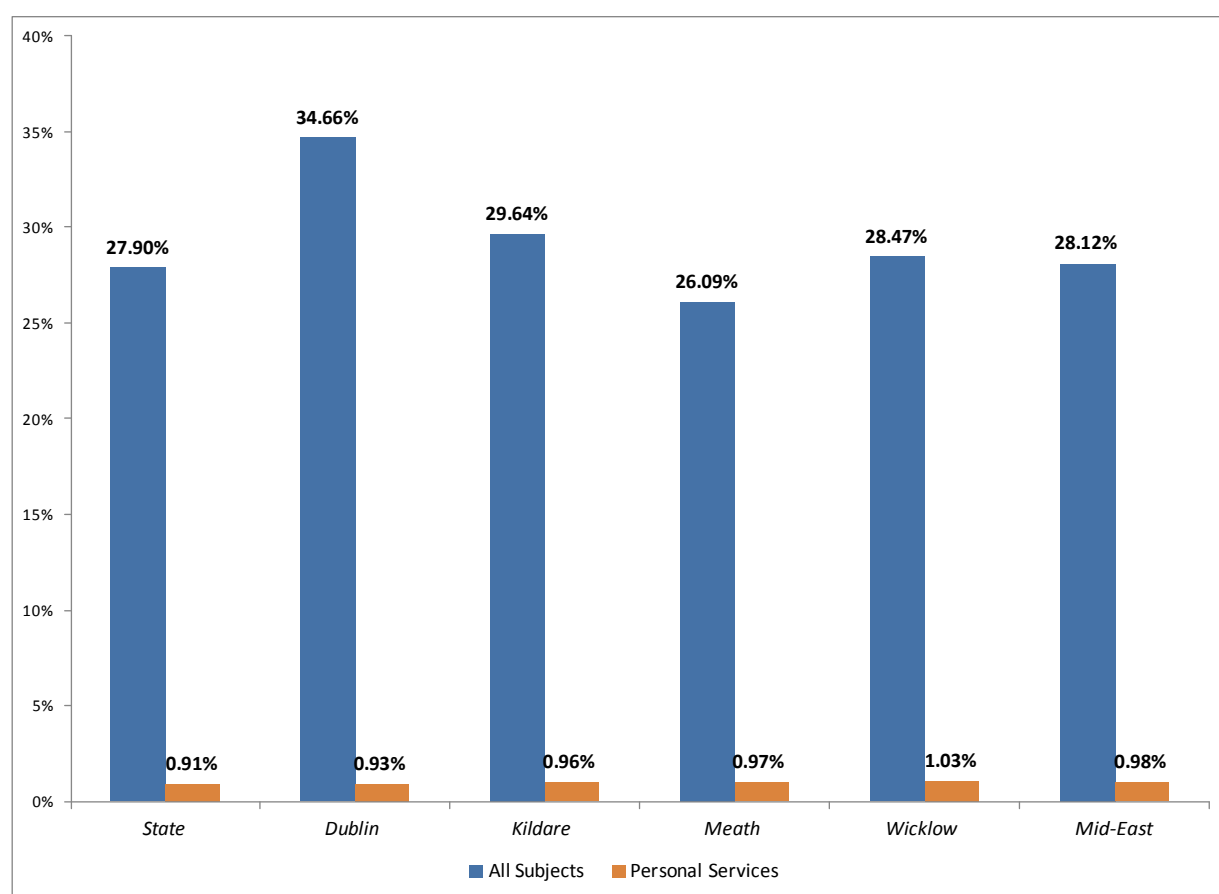
Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A10 (p. 277) for the corresponding graph where the denominator is all residents in each location.

Personal Services

As remarked earlier, personal services includes (as its largest component) courses in tourism and hospitality, which underpins an important part of economic activity in Ireland and a growing part of Meath's economy (see Table 7.9, p. 102, where the extent of employment growth in hotels and restaurants is shown).

The analysis presented in Figure 7.14 below shows that the proportion of residents aged 15 years and above with third-level or higher educational qualifications in personal services is a little higher in Meath compared with the State, Dublin and Kildare, with Wicklow exhibiting the highest proportion of the locations.

Figure 7.14: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas and Personal Services



Source: CSO Census 2011 data, consultancy team analysis.

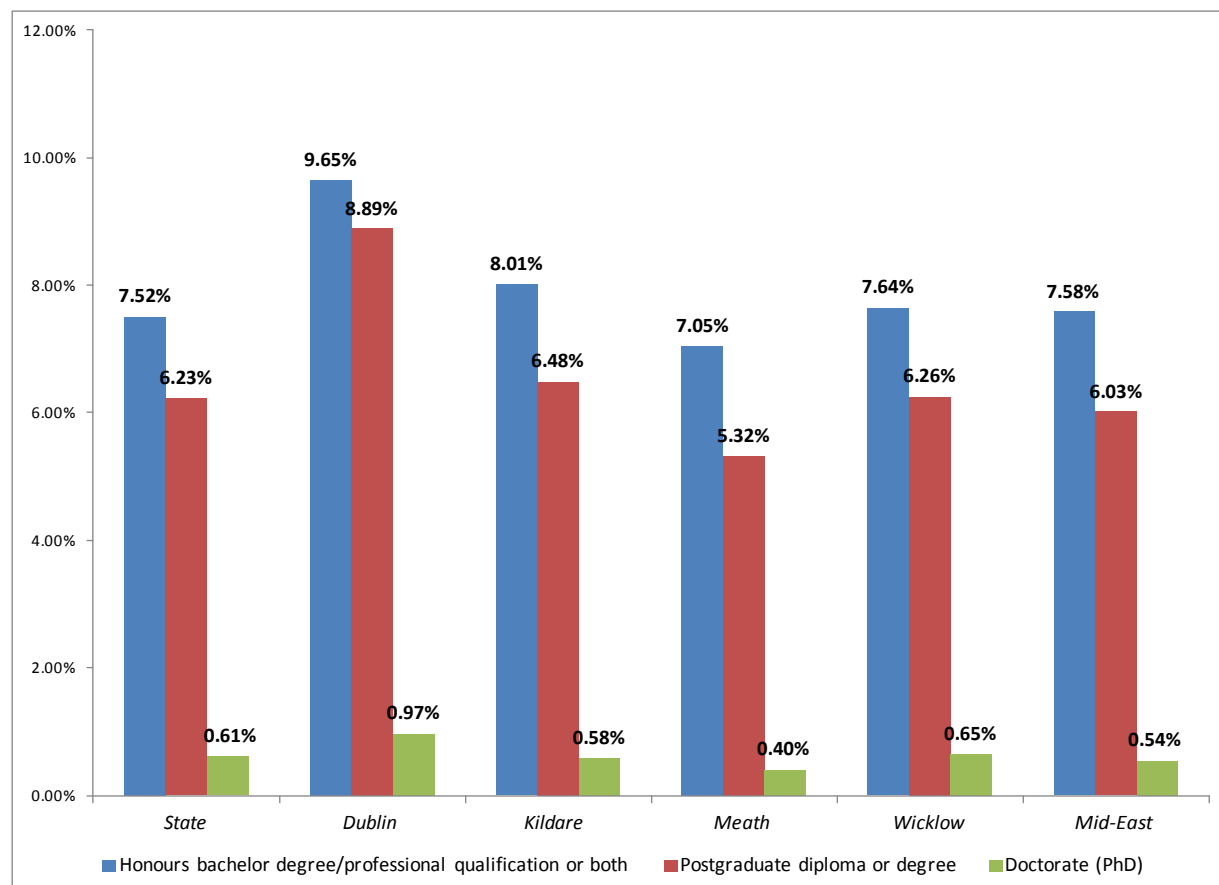
Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A11 (p. 278) for the corresponding graph where the denominator is all residents in each location.

Level of Third-Level Educational Qualifications

The next graph looks at educational attainment in respect of honours bachelor degrees/equivalent (NFQ Level 8), postgraduate diplomas and degrees (NFQ Level 9) and PhD/doctoral degrees (NFQ Level 10).

Figure 7.15 shows that Meath's performance in this regard is lower compared with the other locations. In particular, the proportion of residents aged 15+ years with third-level or higher qualifications at honours bachelor degree/equivalent level (NFQ Level 8) is lower in Meath (7%) compared with Dublin (10%), Kildare (8%), Wicklow (7.6%) and the State (7.5%). Furthermore, the proportion of residents with third-level qualifications at postgraduate diploma/degree level (including master degrees) (NFQ Level 9) is also lower in Meath (5.3%) compared with Dublin (9%), Kildare (6.4%), Wicklow (6.3%) and the State (6.2%). The same finding obtains in respect of third-level qualifications at PhD/doctoral level (NFQ Level 10): Meath (0.4%), Dublin (1%), Wicklow (0.7%), Kildare (0.6%) and the State (0.6%).

Figure 7.15: Proportion of Residents Aged 15 Years and Above in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – Level of Third-Level Qualifications



Source: CSO Census 2011 data, consultancy team analysis.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. See Figure A12 (p. 279) for the corresponding graph where the denominator is all residents in each location.

Higher Education Authority Data

Full-Time Student Enrolments

The Higher Education Authority (HEA) makes available data on full-time students (undergraduate and postgraduate) enrolled at HEIs in Ireland by county of permanent address (of Irish students) – the latest available data pertaining to the academic year 2009/10 (when this part of the analysis was carried out in early 2014). The HEIs covered are the universities (13) and the institutions of technology (IoTs) (15).¹⁴³

Table 7.11 provides an analysis of the HEA data and shows that in the academic year 2009/2010 there were a total of almost 5,000 students whose permanent county of address was Meath and this accounted for a share of 3.4% of all students in Irish HEIs in that year (comprising 2,833 students in the universities, with a national share of 3.3%, and 2,160 students in the IoTs, with a slightly higher national share of 3.7%). However, Meath's share of all students enrolled in full-time courses in Irish HEIs in that year (3.4%) was lower than its share of the population in 2011 (4%). It is seen that Kildare's share of all students enrolled at the universities and IoTs in the 2009/2010 academic year (4%) was higher than Meath's share (3.4%), although the Kildare proportion was also lower than that county's share of the national population in 2011 (4.6%). In fact, the same observation also applies to Dublin and Wicklow – their shares of all full-time students at Irish HEIs were lower than their population shares.¹⁴⁴

Table 7.11: Number of Full-Time Students Enrolled in Higher Education Institutions (Universities and Institutes of Technology) by County of Permanent Address (Academic Year 2009/2010)

Geographic Area	Full-Time Students Enrolled in 2009/2010 Academic Year						Population (2011)	
	Universities	% of State	IoTs	% of State	All HEIs	% of State	Pop	% of State
Dublin	22,533	26.2%	11,315	19.3%	33,848	23.4%	1,273,069	27.7%
Meath	2,833	3.3%	2,160	3.7%	4,993	3.4%	184,135	4.0%
Kildare	3,733	4.3%	2,109	3.6%	5,842	4.0%	210,312	4.6%
Wicklow	2,252	2.6%	1,564	2.7%	3,816	2.6%	136,640	3.0%
State	86,026	100.0%	58,706	100.0%	144,732	100.0%	4,588,252	100.0%

Source: HEA data (supra footnote 143), consultancy team analysis.

Note: Undergraduate and postgraduate students.

¹⁴³ In particular, the universities are (in the order in which they appear on the HEA's spreadsheet, which is available for download from its website (<http://www.heai.ie/en/statistics/student-details>): University College Dublin (UCD), University College Cork (UCC), National University of Ireland Galway (NUIG), Trinity College Dublin (TCD), National University of Ireland Maynooth (NUIM) (Maynooth University), Dublin City University (DCU), University of Limerick (UL), Mary Immaculate College (MIC), St. Patrick's College Drumcondra (SPD), Mater Dei Institute of Education (MDEI), National College of Art and Design (NCAD), Royal College of Surgeons of Ireland (RCSI) and St. Angela's College Sligo. The IoTs are: Athlone Institute of Technology (AIT), Cork Institute of Technology (CIT), Dublin Institute of Technology (DIT), Dún Laoghaire Institute of Art and Design (DLIADT), Dundalk Institute of Technology (DkIT), Galway-Mayo Institute of Technology (GMIT), Institute of Technology Blanchardstown (ITB), Institute of Technology Carlow (ITC), Institute of Technology Sligo (ITS), Institute of Technology Tralee (ITTRA), Letterkenny Institute of Technology (LYIT), Limerick Institute of Technology (LIT), Tallaght Institute of Technology (TI) and Waterford Institute of Technology (WIT).

¹⁴⁴ In contrast, Galway City and County is an area whose share of all full-time students in Irish HEIs (universities and IoTs) (7.1% in the academic year 2009/2010) was higher than its share of the national population (5.5% in 2011).

Who Went to College in 2004 – Leaving Certificate Attainment among New Entrants 2004

In 2006, the HEA published the results of research and a survey into entrants to HEIs in 2004. The work was based on a standardised questionnaire issued to each HEI, analysis of the Central Admissions Office (CAO) database, a postal survey of all entrants to higher education courses in Ireland in 2004 (response rate of 42%) and the ESRI School Leavers' Survey. However, the report is careful to point out (p. 19) "the difficult nature of the tasks involved in this study and that all figures in this report are estimates to some degree. This arises because of uncertainty about the accuracy of information provided by students and also because of uncertainty about the recording and coding of information in college databases".¹⁴⁵ It should also be remembered that the HEA study pertains to college *admissions* and not to HE *attainment* (they should not be confused due to students dropping out of courses for various reasons etc.).

The HEA study contains an interesting piece of information regarding the level of prior academic attainment of new higher education entrants by county (Table 6.6, p. 121 of the 2006 study). Unfortunately the table referred to groups Meath and Westmeath together (the only counties grouped, which might suggest that there were sampling issues with these counties). In 2004, the proportion of new higher education entrants from Meath/Westmeath with 5 or more grade Cs on higher level Leaving Certificate papers was 38.4%, which was lower than Dublin (46.3%), Wicklow (44.8%), Kildare (42.2%) and the country overall (42.4%).

Other Relevant Considerations

The Irish Times newspaper publishes a supplement showing the extent of progression from secondary schools to HEIs (in Northern Ireland as well as Ireland) on a county-by-county basis. The consultancy team has considered *The Irish Times* 'School League Tables 2012' (the supplement was published on 21 November 2012) and an analysis of the Meath schools in that year is presented in the Annex (Table A3, p. 280). While numbers and college acceptances vary from year to year, the analysis presented in the aforementioned table nevertheless provides an accurate indication of the college destinations of Meath school-leavers and hence the main HEIs serving higher educational attainment in the county.¹⁴⁶

In 2012, a total of over 1,700 pupils in Meath schools sat the Leaving Certificate Examination and 1,357 progressed to higher education study, meaning progression rate of 80% in that year – around the same as the national figure.¹⁴⁷ The main HEIs serving Meath from the analysis are:

- DIT (15% of all Meath student intake in 2012);
- Maynooth University (NUIM) (14%);
- DCU (12%);
- DkIT (11%);
- UCD (9%);
- ITB (8%);
- TCD (7%);
- AIT (4%).

¹⁴⁵ The report is available at http://hea.ie/sites/default/files/who_went_to_college_in_2004.pdf. To the best of our knowledge, and after consultation with the HEA, there has not been a more recent version of the study.

¹⁴⁶ *The Irish Times* supplement has become known for providing a noteworthy source of information of the college destinations. However, the reader is also drawn to the methodology used by that newspaper in preparing the league tables and the caveats therein, which the consultancy team notes.

¹⁴⁷ However, this does not necessarily mean that HE attainment is the same between Meath and the State (due to drop out from college etc.).

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).

The analysis presented in Table 7.12 below shows the scale of these HEIs, which we believe has marketing potential in terms of promoting economic development in County Meath. In the latest academic year for which HEA are available (2012/2013 academic year), 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.¹⁴⁸

Table 7.12: Number of Full-Time and Part-Time Students Enrolled in HEIs in the Vicinity of County Meath and the State (2012/2013)

HEI	2012/2013 Academic Year								
	Full-Time Enrolments			Part-Time Enrolments			Total Enrolments		
	U/G	P/G	Total	U/G	P/G	Total	U/G	P/G	Total
AIT	3,543	205	3,748	789	231	1,020	4,332	436	4,768
DCU	7,615	1,325	8,940	1,343	1,384	2,727	8,958	2,709	11,667
DIT	11,739	989	12,728	2,558	1,405	3,963	14,297	2,394	16,691
DkIT	4,092	86	4,178	387	53	440	4,479	139	4,618
ITB	2,370	69	2,439	663	22	685	3,033	91	3,124
NUIM	6,364	1,218	7,582	1,230	694	1,924	7,594	1,912	9,506
TCD	10,362	3,761	14,123	178	1,557	1,735	10,540	5,318	15,858
UCD	15,428	4,626	20,054	1,024	2,853	3,877	16,452	7,479	23,931
Total	61,513	12,279	73,792	8,172	8,199	16,371	69,685	20,478	90,163
State	142,718	21,780	164,498	21,130	14,051	35,181	163,848	35,831	199,679
Total % State	43%	56%	45%	39%	58%	47%	43%	57%	45%

Source: HEA data, consultancy team analysis.

Note: U/G denotes undergraduate and P/G postgraduate. These figures pertain to higher education qualifications (NFQ Levels 6-10, Figure A5, p. 272). NUIM now known as Maynooth University.

Educational Performance in Ireland in International Context – 'Maths, Maths, Maths'

A 'good story' can therefore be told about County Meath and its close proximity to a range of universities and IoTs that taken together account for a substantial proportion of the country's student population at both undergraduate and postgraduate levels.

¹⁴⁸ The figures presented in Table 7.12 do not include Tallaght IT. Even though this HEI accounted for a relatively small proportion of Meath Leaving Certificate students progressing to third-level in 2012 (namely 13 or 1%, Table A3 on p. 293), this IoT is nevertheless significant and well-placed on the M50 in relation to Meath (in the 2012/13 academic year, it accounted for almost 3,000 full-time students and a further almost 1,400 part-time students at undergraduate and postgraduate levels). Also relevant to note is the plethora of other third-level institutions in-and-around Dublin, including privately-run colleges offering undergraduate and postgraduate higher education qualifications.

However, returning to the apparent lag in Meath's third-level educational attainment performance as illustrated above, this needs to be also seen in the context of challenging times faced by the performance of the Irish education system internationally. It is sometimes erroneously believed, or even stated, that Ireland has a 'world class education system'. However, this does not reflect the evidence and Ireland's mediocre educational performance could be a threat to inward investment in the coming years. This means that Meath's lagging in third-level educational performance could be seen as especially telling from a FDI perspective and needs to be addressed as a matter of priority.

Various metrics can be quoted to illustrate Ireland's mediocre educational performance and we will refrain from that presently. However, what is of concern is apparent mathematical ability at post-primary level. A relevant trend is the relative proficiency of the country's 15-year olds in mathematics as revealed in the last two PISA (Programme for International Student Assessment) exercises, which were conducted in Ireland and other countries in 2009 and 2012. In 2009, Ireland's performance in maths proficiency at this level was statistically significantly below that of the OECD average. While Ireland's maths score improved in 2012 and was above the OECD average, the OECD's evidence also shows that Ireland's annualised change in score points in maths (between the country's earliest participation in PISA and PISA 2012) was negative (and it was also negative in reading).

Further, within the maths component of the 2012 PISA exercise, the OECD estimated the share of low achievers and the share of top performers in the subject: while Ireland's share in respect of low achievers in maths (16.9%) was lower than the OECD average (23.1%), the country's share of top performances in this subject (10.7%) was also lower than the OECD average (12.6%). In other words, while Ireland may be getting better at the lower end of the achievement distribution in maths, the evidence also illustrates that the country may be performing less strongly in respect of top performance in maths, which is where Ireland needs to be (on a consistent basis) to be a genuinely competitive economy and world class investment location. In contrast, one of the top performing countries in education, Singapore, with which Ireland competes in the globalised FDI marketplace, had shares of 3.8% and 40% in respect of low achievers and top performers respectively in maths in the PISA 2012 exercise.¹⁴⁹

There is no shortage of ways proposed to enhance Ireland's performance in maths, but some of what we consider to be sensible proposals are apparently not being implemented, according to independent evidence that we have reviewed: for example, Irish schools generally appear not to be making use of the opportunity afforded by Transition Year to enhance maths performance and facilitate more students to take the subject at Higher Level in the Leaving Certificate. One of the objectives of the National Strategy to Improve Literacy and Numeracy among Children and Young People 2011-2020 is to increase the instruction time made available for numeracy (and literacy), and it includes a specific requirement that mathematics is to be taught regularly during Transition Year (TY). However, according to the Educational Research Centre (ERC), this has not yet happened to a large extent, where it states:

"little attention has been paid to the outcomes of teaching and learning mathematics in Transition Year. In addition, there is very little information on the content of mathematics programmes for Transition Year being implemented in schools, how they are delivered, and the amount of time spent delivering them".¹⁵⁰

¹⁴⁹ In May 2014, the OECD published the results of another maths exercise stemming from PISA 2012, which shows that while Irish 15-year olds are good at retaining knowledge, their application or use of the knowledge is less strong (<http://www.oecd.org/pisa/keyfindings/pisa-2012-results.htm>).

¹⁵⁰ ERC (2012) 'Mathematics in Transition Year: Insights of Teachers from PISA 2012' (Summary Brochure).

As part of PISA 2102 in Ireland, the ERC conducted of national survey of maths teachers in Ireland. In total, 1,321 teacher questionnaires and 171 mathematics coordinator questionnaires were completed, representing nationally representative samples, with response rates of 80% and 93% respectively. Based on the survey findings, the ERC made a number of recommendations, including stronger promotion of maths education in TY, with emphasis on its relevance and career opportunities. In addition, it was also recommended that schools should ensure that teaching of maths is prioritised during TY; the use of mixed-ability maths classes in TY; and that teachers should supported through CPD in implementing more innovative approaches to the teaching, and assessment, of maths in TY.

The ERC, also in 2012, and as part of PISA 2012 in Ireland, conducted another survey in that year, this time on Project Maths in Ireland. Project Maths was implemented initially in 24 representative schools in September 2008 and was aimed as a major curriculum development in the teaching and learning of maths at both junior and senior cycles of secondary schooling in Ireland. At the time of the PISA tests in Ireland for the 2012 PISA assessment (March 2012), Project Maths had not been fully implemented in schools in Ireland and, according to the ERC, most of the pupils who took part in PISA 2012 would not have studied under the new curriculum. Among the results of the ERC survey are the following findings:

- 68-85% of maths teachers surveyed were qualified to teach maths according to Teaching Council guidelines;
- One-third of teachers surveyed felt that their initial education/qualifications had not prepared them adequately in the areas of mathematical content and assessment of maths;
- Noting that the ERC pre-dated the introduction of the bonus points system for Higher Level Maths in 2012, the survey found that a dramatic decrease in the proportion of students studying maths at higher level as they proceed from Junior to Leaving Certificate;
- Teachers were still reliant on ‘traditional’ methods and sources to guide their teaching of maths, despite the aim of Project Maths to promote a more “constructivist” approach to the teaching of maths;
- Reflecting the latter finding, just three-in-ten maths teachers were classified as high users of ICT in the teaching and resourcing of maths teaching.

On foot of the survey findings, the ERC recommended that schools should do more to encourage student to maintain higher level maths as they proceed from junior to senior cycle; greater use of ICT and ICT resources should be used in the teaching of maths; parents need to be much better informed about Project Maths and should be encouraged by schools to become more involved in enhancing maths teaching at schools.

The above observations are not to ignore the importance of recent initiatives, such as the Bonus Points for Higher Level Maths at Leaving Certificate and Project Maths at Junior Certificate as well as Leaving Certificate Level. However, it is too early yet to judge the success or otherwise of these initiatives.

To be fair, the Irish system is working hard to address the educational issues. For example, it is duly emphasising STEM performance (the country’s science performance in PISA is significantly higher than the OECD average and Ireland has the third highest participation rate in STEM subjects in higher education in the OECD), (ii) the country is undertaking significant reform in its initial teacher education system, (iii) Ireland is maintaining a focus on CPD (continuing professional development) despite difficult budgetary conditions, and (iv) policy is aiming to make the teaching profession more accountable (e.g. through the Teaching Council). These are welcome developments and should lead to better outcomes during the medium-term and beyond (but continual improvements will be required and should include emphasis on *outputs and measurable achievements* and not just inputs).

Box 7.3: PISA – International and Irish Evidence

PISA stands for Programme for International Student Assessment and records 15-year old proficiency in maths, science and reading in a standardised way across countries. It was launched by the OECD in 1990 and the decision to measure 15-year old proficiency was because that tends to be the age in OECD countries when pupils are about to leave compulsory education. The proficiency test is a 2-hour test in the three subject areas and is administered by the participating countries and reported upon every three years. The PISA test is more concerned with the *practical use* of knowledge than the knowledge itself (it aims to test ability to think). The test is conducted among samples of pupils in each country and then extrapolated nationally. PISA also accounts for differences in socio-economic background in the participating countries and institutional differences in how education is delivered.

Before considering the PISA results for Ireland and other countries below, it is worth reflecting on some of the overall findings of PISA since its introduction to date:

- Girls significantly outperform boys in reading, to such an extent that it is as if they had an extra year advantage on boys in this subject, according to the OECD;
- On the other hand, boys tend to do better than girls in maths (and the latest PISA results for 2012 reveal that the gap between boys and girls in maths is growing among the top performing countries, where boys have a much higher share, and the OECD observes that girls tend to have lower expectations in performing well in maths, not because they are innately less strong in this subject but rather because they tend not to be expected to do well in maths);
- There is no significant difference between boys and girls in science proficiency;
- Early tracking of pupils is not associated with better overall performance, suggesting that policies that stream pupils into academic and vocational pathways at school are ineffective;
- Tracking between academic and vocational streams is also sometimes made, according to the OECD, in the “mistaken belief” that only some students can achieve academically while others are better equipped for a more vocationally-oriented career;
- On the other hand, where all children are given the opportunity and support to excel academically, they can achieve in this way and countries like Finland and Singapore are noteworthy in this regard;
- The availability to repeat years/grades is not associated with better performance – educational systems that invest more in getting their pupils through *first time round* tend to have higher scores than those where systems give the opportunity to repeat years/grades for one or more years;
- According to PISA, the most successful schools are those in which pupils do well regardless of where they come from – although it is also found that home background is a significant determinant of performance in PISA;
- However, countries, like Finland, that attempt to produce schools where performance is independent of home background, class, income etc. tend to perform more strongly in PISA performance;
- The OECD research from PISA also finds that the best teachers tend to be found in schools located in advantaged areas and that more teachers alone is not necessarily associated with better outcomes (more teachers tend to be allocated to schools in disadvantaged areas but it is *quality*, rather than *quantity*, that makes the difference, other things being equal);
- The good news from PISA for countries around the world generally is that;
 - Countries do not have to be wealthy to produce strong educational performance and
 - Countries that make education a priority tend to perform strongly in PISA – these tend to be characterised by the belief that all children can excel, regardless of background, and they invest in promoting the quality of teachers (through selection, training and professional development) so that as many pupils/children as possible can benefit and to avoid the risk that teacher quality is unevenly distributed on the lines of socio-economic background, area etc.

Continued overleaf...

...from above

On 3 December 2013, the OECD published the results of the latest PISA proficiency scores in reading, science and maths (conducted in 2012). Compared with the 2009 results, Ireland has exhibited improvement in all three subject areas, which is good news, but underlying issues remain.

In all three subjects, Ireland's overall PISA scores in 2012 were above the OECD average: the country's highest score was attained in reading (523 compared with the OECD average of 496); in maths, Ireland's score was 501 (OECD mean score was 494); and in science the country scored 522 (OECD average score was 501). Relatively speaking, then, maths continues to be the subject in which the country's 15-year olds struggle. In all three subjects, Finland and Singapore outperformed Ireland. With the latest PISA scores (2012), the OECD has introduced an 'annualised change in score points', which it describes as "the average annual change in PISA score points from a country's/economy's earliest participation in PISA to PISA 2012. It is calculated taking into account all of a country's/economy's participation in PISA".

According to the OECD, Ireland's annualised change in score points in 2012 relative to its earliest participation in PISA was positive in science (2.3) but negative in reading (-0.9) and maths (-0.6). The country has therefore deteriorated in maths and reading performance, despite the seemingly improved scores in 2012 compared with 2009. Further, within maths, the OECD has estimated the share of low achievers and the share of top performers in this subject: while Ireland's share in respect of low achievers in maths (16.9%) is lower than the OECD average (23.1%), the share of top performances in this subject (10.7%) is lower than the OECD average (12.6%).¹⁵¹

A noteworthy feature of the 2012 results is the exceptional performance of Asian countries – like Shanghai-China, Hong Kong-China, Chinese Taipei and Korea as well as Singapore, which came in second place behind the first mentioned country. This, we believe, is a big wake-up call for Ireland and other western economies because ultimately Ireland's school-leavers and graduates will be competing with those in these countries for a slice of the economic growth occurring in these major emerging markets and presently the school children in these locations are winning hands-down and have been doing so for a number of years, according to the OECD's evidence. Entrepreneurs and business leaders of the future cannot credibly go to these countries and pitch to the businesses and governments of these countries when their countries' children are performing better in key subjects underpinning economic growth – unless Ireland has other advantages (which may not be the case in the future as the emerging markets catch-up and all the evidence points to them catching up rapidly and it will not be long before China is the world's largest economy).

The OECD has put a lot of emphasis on maths performance in its latest exercise (2012), owing to the crucial role it plays in economic development, and it observes that Asian countries fill the first seven places in this subject. These top-performing countries appear not to be content with their strong performance and recognise the need to be even better and to ensure more equitable performance to facilitate the full benefits of economic progress.

Source: Consultancy team review.

International Student Enrolments

As signalled earlier in this report, and emphasised in our conclusions and actions, foreign languages is an identified issue for the ongoing performance of indigenous and FDI firms countrywide, including Meath. For instance, it is now a fairly well-established fact that inward investment firms prefer to have 100% fluency in foreign languages as part of their desired skill sets and this inevitably means the availability of foreign nationals in Ireland. An important source (potentially and otherwise) for this resource is the number of international students enrolled at the country's HEIs – non-European as well as European. The next table presents analysis of this in the HEIs in the vicinity of Meath and shows how the picture compares with the country as a whole.¹⁵²

¹⁵¹ The corresponding shares for Singapore are 8.3% and 40% for low achievers and top performers in maths.

¹⁵² The c. 7% international student rate observed in Ireland is comparably low internationally and a challenge for Irish education policy is to boost Irish HEIs as a study location abroad.

The analysis shows a number of interesting patterns. First, the proportion of international students (i.e. as defined here as students outside of Ireland, NI and GB) relative to all students (full-time) varies from 1.5% at ITB to 11.3% at TCD. Second, with the exception of Maynooth University, the international student proportion among the universities exceeds that among the IoTs in the list (the rate at Maynooth University was 2.9% in 2012/2013, which was lower than all of the IoTs apart from ITB. Thirdly, 46% of all international students enrolled in full-time HEI courses in Ireland in 2012/2013 were located in the HEIs listed in the vicinity of Meath and the proportion of European students (EU and non-EU) exceeded 60% in the list.

Overall the results indicate that the universities and IoTs in the vicinity of County Meath together account for almost 50% of all international students enrolled on HE courses in Ireland and the rate is even higher in respect of European students studying in Ireland (>60%).

Table 7.13: Number of Full-Time International Students Enrolled in HEIs in the Vicinity of County Meath and in the State (2012/2013)

Full-Time Enrolments, 2012/2013 Academic Year												
International Students (Excl. Ireland and UK)												
HEI	Europe EU (Excl. Ireland and UK)								Total	% Int. Students	Ireland and UK	Overall Total
	Africa	North America	South America	Asia	Ireland and UK	Europe Non-EU	Oceania	Other				
AIT	20	3	2	207	41	2	0	0	275	7.3%	3,473	3,748
DCU	12	112	2	150	342	17	2	133	770	8.6%	8,170	8,940
DIT	14	31	5	297	98	9	1	36	491	3.9%	12,237	12,728
DkIT	6	1	0	237	6	0	0	19	269	6.4%	3,909	4,178
ITB	1	3	0	26	4	1	0	1	36	1.5%	2,403	2,439
NUIM	13	34	5	77	73	7	0	12	221	2.9%	7,361	7,582
TCD	83	438	17	506	477	59	14	0	1,594	11.3%	12,529	14,123
UCD	57	397	10	900	328	42	2	1	1,737	8.7%	18,317	20,054
Total	206	1,019	41	2,400	1,369	137	19	202	5,393	7.3%	68,399	73,792
State	479	3,426	71	5,224	2,089	228	80	233	11,830	7.2%	152,668	164,498
Total % State	43%	30%	58%	46%	66%	60%	24%	87%	46%		45%	45%

Source: HEA data, consultancy team analysis.

Note: These figures pertain to higher education qualifications (NFQ Levels 6-10, Figure A5, p. 272). North America includes the US, Canada and Central America and the islands off same; Oceania includes Australia; Other includes New Zealand. NUIM now known as Maynooth University.

Research and Knowledge Transfer with Industry

We have also examined HEA data on metrics relating to research and knowledge transfer among the eight HEIs in the vicinity of Meath and calculated the concentration of performance in this small group of universities and IoTs to which the county lies in close proximity (remembering that the choice of the eight HEIs reflects the destinations of school-leavers in Meath and the concentration calculations presented here are likely to underestimate the concentration because the list does not include all HEIs

in the region). Nevertheless, the results illustrate how Meath is favourably located to the country's leading HEIs in respect of research and knowledge transfer performance.¹⁵³

Table 7.14 below reveals that in 2009/2010 the eight universities and IoTs in the vicinity of Meath together accounted for over 54% of all research grants and contracts awarded to HEIs in the State in that academic year. It is also noted that the eight HEIs accounted for over 46% of all academic staff in the country's HEIs in the academic year 2010/2011.

Table 7.14: Research and Knowledge Transfer Resources of HEIs in the Vicinity of Meath

HEI	Research/Knowledge Transfer Inputs					
	Income (2009/2010)			Staff (2010/2011)		
	Research Grants and Contracts					
	Total (€000)	(€000)	% Total	Total	Academic	% Total
AIT	47,393	3,529	7.4%	509	267	52.5%
DCU	139,161	45,851	32.9%	1,209	735	60.8%
DIT	191,375	16,401	8.6%	1,888	1,025	54.3%
DKIT	50,375	5,182	10.3%	498	286	57.4%
ITB	21,065	820	3.9%	210	127	60.5%
NUIM	96,903	23,533	24.3%	749	409	54.6%
TCD	276,746	81,977	29.6%	2,819	1,360	48.2%
UCD	362,154	84,816	23.4%	2,978	1,507	50.6%
Total	1,185,172	262,109	22.1%	10,860	5,716	52.6%
State	2,490,254	482,167	19.4%	22,686	12,336	54.4%
Total % State	47.6%	54.4%		47.9%	46.3%	

Source: HEA data (*supra* footnote 153), consultancy team analysis.

Note: NUIM now known as Maynooth University.

The next table below presents analysis of data on the HEIs' research/knowledge transfer outputs (2010/2011) in terms of patent applications, patents granted and other knowledge transfer activities. As before, the eight universities and IoTs together account for an appreciably large proportion of activities measured in this way.

First, it is seen that they accounted for 55% of all patent applications in Ireland and other countries in 2010/2011.

Second, the eight universities and IoTs accounted for 40% of all patents granted in Ireland and all other areas in that year.

Third, in the same period, the universities and IoTs accounted for 53% of all licence agreements with industry.

¹⁵³ The HEA data considered here are taken from the HEA publication of December 2013 entitled Towards A Performance Evaluation Framework: Profiling Irish Higher Education (available at http://www.heai.ie/sites/default/files/evaluation_framework_long.pdf).

Finally, they accounted for an even larger proportion (56%) of all spin-out companies created in Irish HEIs in 2010/2011.

Table 7.15: Research and Knowledge Transfer Activity of HEIs in the Vicinity of Meath

HEI	Research/Knowledge Transfer Outputs (2010/2011 Cumulative)							
	No. Patent Applications			No. Patents Granted			Other Knowledge Transfer	
	Ireland Only	All Other Areas	Total	Ireland Only	All Other Areas	Total	No. Licence Agreements with Industry	No. Spin-Out Companies Created
AIT	0	1	1	0	0	0	1	0
DCU	2	21	23	2	10	12	47	9
DIT	0	9	9	0	0	0	26	7
DkIT	5	1	6	0	0	0	0	1
ITB	0	0	0	0	0	0	0	0
NUIM	5	3	8	2	0	2	15	6
TCD	9	48	57	1	8	9	21	13
UCD	20	61	81	0	11	11	35	9
Total	41	144	185	5	29	34	145	45
State	82	257	339	14	72	86	276	81
Total % State	50.0%	56.0%	54.6%	35.7%	40.3%	39.5%	52.5%	55.6%

Source: HEA data (supra footnote 153), consultancy team analysis.

Note: NUIM now known as Maynooth University.

Summary of Review and Analysis of People Resources – Residents of County Meath

The **positives** for County Meath are summarised as follows:

- ✓ Large and growing population – one of the fastest growing parts of Ireland during 2006-2011.
- ✓ Relatively high proportion of young people/children for future labour supply (so long as these people do not emigrate or leave the county in significant numbers, which in turn will tend to be a function of macroeconomic management of the Irish economy in the coming years).
- ✓ Comparably low old age dependency rate.
- ✓ Meath has one of the highest LFP rates in the country (65.8% versus 61.9% for the State in 2011).
- ✓ Live Register data suggest that the unemployment problem is easing relatively rapidly in Meath as a whole and in the main urban centres of Navan and Trim, and in Kells
- ✓ Residents of Meath are employed in a variety of sectors and those with a relatively high concentration of all employment and/or which have grown rapidly compared with Dublin, the Mid-East Region and the country as a whole during 2006-2011 include:
 - Agri-food and forestry – Meath is strong in beef and dairy farming
 - Mining and quarrying – Meath benefits from a rich tradition in mining and quarrying
 - Manufacturing – Meath's higher concentration of residents employed in manufacturing industries compared with Dublin may be an important differentiator in respect of attracting high-end manufacturing to the county in the coming years (although it is important that FDI is targeted widely – services and manufacturing activities that can be

- successfully accommodated in the county, given skills etc)
- Transport, storage and communications – reflecting Meath’s favourable location
 - 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.
- While the recent designation of Kells as an ‘Assisted Area’ in the new Regional Aid Map for Ireland (2014-2020) illustrates the economic challenges facing the town and the northern environs of Meath, the new designation is also an important opportunity for the town and the surrounding area to benefit from new investment and to assist the growth of SMEs.
 - In the vicinity of Meath are the country’s top universities and institutes of technology that together account for over 90,000 students or 45% of the country’s overall number of students in higher education courses.
 - The same universities and IoTs in the vicinity of Meath together account for almost 60% of the State’s postgraduate students (including PhD and master level students).
 - Furthermore, these universities and IoTs together account for almost half of all international students enrolled on HE courses in Ireland (i.e. students from countries other than Ireland and the UK) and the rate is even higher in respect of European students (EU and non-EU) studying in Ireland (>60%).
 - In research and knowledge transfer with industry, the eight universities and IoTs in the vicinity of Meath together accounted for over 54% of all research grants and contracts awarded to HEIs in the State in the academic year 2009/2010 and they accounted for over 46% of all academic staff in the country’s HEIs in 2010/2011.
 - In addition to the above, the eight universities and IoTs also accounted for (in 2010/2011):
 - 55% of all patent applications in Ireland and other countries in 2010/2011
 - 40% of all patents granted in Ireland and all other areas in that year
 - 53% of all licence agreements with industry and
 - An even bigger proportion (56%) of all spin-out companies created in Irish HEIs.

On the other hand, issues for Meath concern the following:

- Comparably low economically active population (15-64 years) in 2011.
- Relatively high total dependency rate (both young and old age dependents as a proportion of the economically active population in 2011) (but this is due mainly to the county’s high youth dependency rate, which may be seen as an advantage in the medium/long-term).
- The concentration of overseas nationals living in Meath is lower than other parts of the country – Dublin, Kildare and the State (if the concentration was relatively high in Meath, it could have some marketing potential in respect of inward investment, owing to the importance placed by FDI firms on workers being 100% fluent in foreign languages for servicing operations and call centre support etc.).
- The proportion of residents (whether all residents or those aged 15+ years) with third-level or higher educational qualifications (NFQ Level 6-10) is lower in Meath compared with other parts of the country (2011), including the State as a whole.
- The relatively low level of third-level or higher educational attainment among residents in

Meath is also apparent in each of the key subject areas commonly regarded as important for enterprise development and jobs, namely:

- Foreign languages
 - Social sciences, business and law
 - Science, mathematics and computing
 - Engineering, manufacturing and construction.
- Furthermore, the proportion of residents in Meath with honours bachelor degrees or equivalent professional qualifications, postgraduate diplomas and degrees (including master degrees) and PhD/doctoral degrees (i.e. NFQ Levels 8-10) is less compared with Dublin and the other counties making up the Mid-East Region, and compared with the State.
 - Meath's share of all full-time students at Irish HEIs (universities and IoTs) was 3.4% in the academic year 2009/2010; lower than its share of the national population in 2011 (4%).
 - We do not consider that the absence of a HEI in County Meath is a significant factor in explaining its comparably low rate of third-level educational attainment owing to (a) its favourable geographic location in respect of many universities and IoTs closeby and (b) the situation of Wicklow, which also is without an HEI but yet exhibits a higher level of third-level educational attainment.
 - The importance of ensuring improvement in educational performance in Meath cannot be overstated, not least in view of the fact that indicators suggest that Ireland overall is struggling in key subject areas (e.g. mathematics) when compared with major emerging economies, which in the coming years will be bigger sources of international investment.

7.4 Structure of Employment *within* Meath

Introduction

The CSO's POWSCAR (2011) provides detailed, specialised data on the number and structure of employment within County Meath based on people's *place of work* and *place of residence*. It enables identification and analysis of the total number of jobs within the county and the distribution of these jobs by residents of Meath and people residing outside of the county (i.e. inbound commuters). The POWSCAR data also enables analysis of Meath's outbound commuters – those who reside in the county but whose place of work is outside the county (the analysis of the outbound commuters is presented in Sub-Section 7.5). The consultancy team is grateful to the Maynooth University researchers who prepared the economic baseline study of Meath in 2013 – we liaised with these researchers in preparing the following data analyses, which are in addition to the tables, charts and maps originally presented in the Maynooth University study.¹⁵⁴

¹⁵⁴ *Supra* footnote 118. As part of the Census 2011 processing programme, the place of work, school or college details were geo-coded. All workers resident in Ireland on Census night were coded to their place of work and all Irish resident students/pupils from the age of 5 years and upwards were coded to their place of school/college. Further details on POWSCAR are available at <http://www.cso.ie/en/census/census2011placeofworkschoolorcollege-censusofanonymisedrecordspowscar/>.

Number and Structure of Employment within Meath

The analysis presented in Table 7.16 below reveals that there were a total of 38,822 jobs (at a fixed location) within Meath in 2011. Of these jobs, 28,449 or 73% were held by residents of Meath and the remaining 10,373 (27%) were held by residents outside of Meath or inbound commuters.

Table 7.16: Number of Jobs in County Meath by Place of Residence (2011)

Place of Work	No. Persons Employed by Place of Residence		
	County Meath	Outside County Meath (Inbound Commuters)	Total
County Meath	28,449	10,373	38,822
% of Total	73.3%	26.7%	100%

Source: CSO POWSCAR (2011), Maynooth University economic baseline study of Meath (2013) and consultancy team analysis.

Note: Fixed location jobs.

Educational Attainment of People Working in Meath

Of interest is to examine the educational attainment levels of those at work in County Meath. It is generally to be expected that the educational attainment of inbound commuters will be higher than that of local workers and this is what transpires in the data relating to Meath (Table 7.17).

In particular, among the 28,449 people who both lived and worked in Meath in 2011, just over 7,000 (25%) had third-level or higher educational attainment; whereas a much higher percentage (37%) of the 10,373 inbound commuters to Meath had third-level or higher educational qualifications in that year. Overall, just over 28% or almost 11,000 of those at work in Meath had third-level or higher educational attainment in 2011.

Table 7.17: Educational Attainment among those at Work in County Meath by Place of Residence (2011)

Highest Level of Educational Attainment	No. Persons Employed in County Meath by Place of Residence							
	County Meath		Outside County Meath (Inbound Commuters)		Total		State	
Not stated	641	2.3%	194	1.9%	835	2.2%	56,998	3.2%
Second-level or lower	20,727	72.9%	6,304	60.8%	27,031	69.6%	948,560	52.5%
Third-level or higher	7,081	24.9%	3,875	37.4%	10,956	28.2%	686,366	38.0%
Total	28,449	100.0%	10,373	100.0%	38,822	100.0%	1,807,360	100%

Source and note: See Table 7.16.

Note in addition that the 1,807,360 people at work in the State in 2011 also include those whose full-time education had not ceased in that year, of which there were 115,436 persons.

However, third-level or higher educational attainment among those at work within Meath was lower compared with the State in 2011. According to Census 2011, there were 686,366 persons at work in the country with third-level or higher educational attainment, equivalent to 38% of all people at work in the country in that year (1,807,360). This proportion is much higher than the corresponding figure for those both living and working in Meath (25%) and marginally higher than the corresponding proportion for the inbound commuters working in Meath in 2011 (37.4%).¹⁵⁵

Socio-Economic Grouping of People Working in Meath

Echoing the previous finding that educational attainment is higher among inbound commuters to Meath compared with local workers, we anticipate that the concentration of workers in higher or more skilled socio-economic groups will be larger in the inbound commuter group. This is evident in Table 7.18.

In particular, the inbound commuters working in Meath were more concentrated in the employer/manager and professional groups compared with the local workers in 2011, and were also proportionately more represented among skilled manual and semi-skilled workers. Not surprisingly, those employed as farmers and agricultural workers were predominately Meath-based.

The 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 and, not surprisingly, Meath boasts proportionately more workers in agriculture/farming compared with the country as a whole.

Table 7.18: Socio-Economic Grouping of those at Work in County Meath by Place of Residence (2011)

Number of Persons Employed in County Meath by Place of Residence								
Socio-Economic Group	County Meath		Outside County 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	100.0%	10,373	100.0%	38,822	100.0%	1,807,360	100.0%

Source and note: See Table 7.16.

¹⁵⁵ But the 38% figure pertaining to the third-level or higher educational attainment among those at work countrywide in 2011 was lower than the corresponding figure for the *outbound* commuters (Sub-Section 7.5).

Economic Sectors of People Working in Meath

Table 7.19 below shows the composition of the 38,822 jobs in Meath in 2011 by economic sector (as defined in the CSO POWSCAR) and the corresponding proportions in respect of the 28,449 jobs held by Meath residents and the 10,373 jobs held by inbound commuters in that year.

The largest sectors for jobs in Meath in 2011 were:

- Wholesale, retail trade, transportation and storage, accommodation and food service activities – 29% of all jobs (slightly higher proportion than this among the local workers and lower among the inbound commuters);
- Education, human Health and social work activities – 21% of all jobs (higher proportion than this among the inbound commuters and lower among the local workers);
- Manufacturing, mining and quarrying, electricity, gas, water supply and waste management – 14% of all jobs (higher proportion than this among the inbound commuters and lower among the local workers); and
- Information and communication, financial, real estate, professional, administration and support service activities – 12% of all jobs (slightly higher proportion than this among the inbound commuters and lower among the local workers).

An alternative way of assimilating the distribution of jobs is to make use of the statistical measure of concentration known as the Herfindahl-Hirschman Index (HHI). This measure is defined as the sum of the squares of the percentages shares of employment by sector and varies between 0 and 10,000: 0 represents non-concentration and 10,000 the situation in which one sector accounts for all jobs. Both of these cases are extreme situations and in practice the HHI varies between the polar values, with HHIs above 2,000 generally suggestive of concentrated labour markets by economic sector.

The HHI values shown at the bottom of Table 7.19 indicate that the Meath labour market by economic sector was 'moderately' concentrated in 2011 and that, perhaps not surprisingly, the degree of concentration among the inbound commuters was slightly greater than that pertaining to the local workers in Meath, suggesting in turn that the inbound commuters were proportionately more represented in sectors with higher wage rates and/or greater value added, commensurate with the higher educational attainment and socio-economic backgrounds among the inbound commuters (as observed earlier).

Table 7.19: Economic Sectors of those at Work in County Meath by Place of Residence (2011)

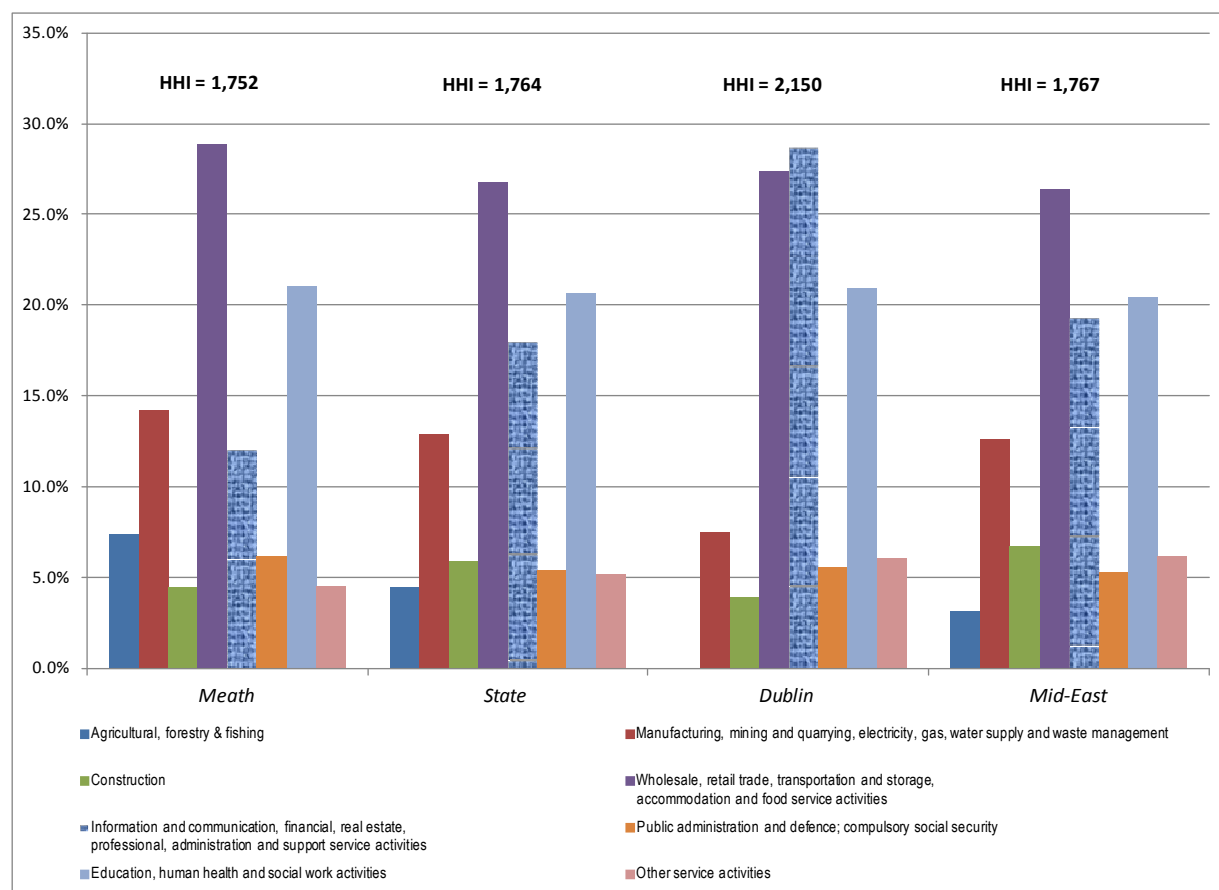
Economic Sector	Number of Persons Employed in County Meath by Place of Residence					
	County Meath	%	Outside County Meath (Inbound Commuters)	%	Total	%
1 Agricultural, forestry & fishing	2,670	9.4%	192	1.9%	2,862	7.4%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	13.2%	1,753	16.9%	5,514	14.2%
3 Construction	1,165	4.1%	554	5.3%	1,719	4.4%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	29.4%	2,824	27.2%	11,180	28.8%
5 Information and communication, financial, real estate, professional, administration and support service activities	3,262	11.5%	1,421	13.7%	4,683	12.1%
6 Public administration and defence; compulsory social security	1,540	5.4%	855	8.2%	2,395	6.2%
7 Education, human health and social work activities	5,798	20.4%	2,351	22.7%	8,149	21.0%
8 Other service activities	1,411	5.0%	340	3.3%	1,751	4.5%
9 Not stated	486	1.7%	83	0.8%	569	1.5%
Total	28,449	100.0%	10,373	100.0%	38,822	100.0%
HHI	1,746		1,839		1,752	

Source and note: See Table 7.16.

Note also that HHI denotes the Herfindahl-Hirschman Index of concentration – the higher the value of the HHI, the more concentrated the level of employment among the economic sectors.

How the distribution of employment by economic sector in Meath compares with that in Dublin, the Mid-East Region and the State is illustrated in Figure 7.16. It is seen that the employment distribution by sector is broadly similar in Meath, the Mid-East Region, which also includes Kildare and Wicklow, and the State and that all three distributions exhibit similar levels of concentration. The key distinguishing features of the employment distribution in Meath is the greater concentration of jobs in (1) agricultural, forestry and fishing, (2) manufacturing, mining and quarrying, electricity, gas, water supply and waste management and (3) wholesale, retail trade, transportation and storage, accommodation and food service activities. On the other hand, it is noticeable from the graph that Meath has a smaller concentration of employment in information and communication, financial, real estate, professional, administration and support service activities (which we have *patterned* in the graph to illustrate the difference) compared with the other locations. Dublin has by-far the largest share in the latter sector and this is reflected in the greater concentration of employment by sector in the capital compared with the other three locations (the HHI exceeds 2,000 in Dublin).

Figure 7.16: Percentage Distribution of Employment by Economic Sector in Meath, Dublin, the Mid-East Region and the State (2011)



Source and note: See Table 7.16.

Note that the patterned bar refers to the information and communication, financial, real estate, professional, administration and support service activities sector for ease of comparison of this key sector between Meath and the other locations. Note also that HHI denotes the Herfindahl-Hirschman Index of concentration – the higher the value of the HHI, the more concentrated the level of employment among the economic sectors. The employment data for the State, Dublin and the Mid-East Region were obtained from the CSO QNHS and pertain to the third quarter of 2011 – the data differ slightly from the employment data for the same regions shown in Table 7.8 and Table 7.9, and were chosen to facilitate direct comparison with the economic sector definitions used in the CSO POWSCAR (2011).

We also considered the proportion of all employment accounted for by non-market or predominantly public sector activities in the POWSCAR data – namely the sectors (a) public administration and defence; compulsory social security and (b) education, human Health and social work activities. The graph above reveals that the local labour market in Meath is a little more reliant on these sectors compared with the other locations.

Age Profile of People Working in Meath

Table 7.20 presents analysis of the age distribution on those at work in Meath in 2011. It is seen that the majority of all those at work within the county were aged between 20 and 44 years – this being a key age category in the context of the period under consideration in this report (2014-2022). It is also seen that the proportion of inbound commuters in this age cohort was even higher (70% compared with 59% of those both living and working in Meath). The corresponding proportion for the State – that is, those at work aged 20-44 years – was 62.6%.

Table 7.20: Age Distribution of those at Work in County Meath by Place of Residence (2011)

Age (Years)	Number of Persons Employed in County Meath by Place of Residence							
	County Meath	%	Outside County Meath (Inbound Commuters)	%	Total	%	State	%
15-19	257	0.9%	82	0.8%	339	0.9%	14,261	0.8%
20-44	16,849	59.2%	7,217	69.6%	24,066	62.0%	1,130,765	62.6%
45-64	10,433	36.7%	2,946	28.4%	13,379	34.5%	617,016	34.1%
65+	910	3.2%	128	1.2%	1,038	2.7%	45,318	2.5%
Total	28,449	100.0%	10,373	100.0%	38,822	100.0%	1,807,360	100.0%

Source and note: See Table 7.16.

Mode of Transport to Work among People Working in Meath

Almost 80% of the 38,822 people at work in Meath in 2011 travelled to work by private transport (typically car) and, not surprisingly, the proportion was even higher among the inbound commuters in that year (94%). Just over 3,000 workers (8% of the total) were home workers and this was due to people both living and working in Meath in that year (apart from a single inbound commuter recorded as a home worker in Meath in 2011). Overall public transport accounted for less than 2% of the total, while soft modes accounted for 11% of mode of transport to work in 2011 (cycling and walking).

Compared with the country as a whole in 2011, *there were appreciably more home workers in Meath (8% versus 4.7%) – which probably reflects the importance of primary agriculture in Meath.* On the other hand, those working in Meath were more reliant on private transport compared with the State (79% compared with 72%) and much less reliant on public transport (1.7% compared with 8.1%), which probably reflects the greater range of public transport options in the larger towns and cities elsewhere in the country compared with Meath. In addition, soft modes were slightly more commonly used elsewhere in the country compared with Meath in the last census year (12% versus 11%).

Table 7.21: Mode of Transport to Work among those Working in County Meath by Place of Residence (2011)

Mode of Transport to Place of Work	Number of Persons Employed in County Meath by Place of Residence					
	County Meath	%	Outside County Meath (Inbound Commuters)	%	Total	%
Not stated	246	0.9%	40	0.4%	286	0.7%
Home worker	3,088	10.9%	1	0.0%	3,089	8.0%
Private transport	20,821	73.2%	9,715	93.7%	30,536	78.7%
Public transport	314	1.1%	351	3.4%	665	1.7%
Soft modes	3,980	14.0%	266	2.6%	4,246	10.9%
Total	28,449	100.0%	10,373	100.0%	38,822	100.0%

Source and note: See Table 7.16.

Summary of Review and Analysis of the Structure of Employment within Meath

The **positives** for County Meath are synthesised as follows:

- In 2011, there were almost 40,000 jobs in County Meath, of which 73% were held by residents living locally in the county and 27% by residents from outside the county (inbound commuters).
- A much larger proportion of the inbound commuters to work in Meath had third-level or higher educational attainment compared with local workers in 2011 (37% versus 25%), which illustrates that the local labour market is capable of attracting high calibre individuals with strong skills (from other locations as well as from within Meath).
- Of all those at work in Meath in 2011 (i.e. both local workers and inbound commuters), almost 11,000 or 28% of the total had third-level or higher educational attainment.
- Proportionately speaking, a greater concentration of inbound commuters to Meath were found in the employer/manager and higher professional socio-economic groups compared with local workers, and the same was true of skilled manual and semi-skilled workers.
- Not surprisingly, the degree of concentration of employment by sector was a little (but not noticeably) higher among the inbound commuters compared with local workers in Meath in 2011, with a slightly greater concentration among the former in sectors paying higher wages and/or higher value added, commensurate with the higher educational attainment and socio-economic backgrounds of the inbound commuters.
- Compared with other parts of the country, there is a greater concentration of employment in Meath in the following economic sectors: (1) agricultural, 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 (although the differences are relatively small in the latter two sectors, (4) and (5)).

On the other hand, **issues** for Meath concern the following:

- Taking into account both the inbound commuters and those both living and working in Meath, the educational attainment of those at work in the county was much lower compared with the State: the proportion of people at work across the country with third-level or higher educational attainment was 38% in 2011, compared with 28% among those at work in Meath.
- The large gap between Meath and the State in this regard reflects the lower educational attainment of those both living and working in Meath, and the more traditional mix of sectors and activities in Meath.
- Meath has a noticeably smaller concentration of employment in information and communication, financial, real estate, professional, administration and support service activities compared with elsewhere in Ireland.
- The local labour market in Meath is also more reliant on public sector employment – (a) public administration and defence; compulsory social security and (b) education, human Health and social work activities – compared with the other locations considered (although the difference between Meath and the other parts of the country does not provide grounds for concern).

7.5 Composition of Meath's (Outbound) Commuter Population

Introduction

Owing to its proximity to the capital, Meath is popularly viewed as lying in the so-called 'Dublin commuter belt'. What follows is a detailed examination of the outbound commuters from Meath – namely those living in Meath but working outside the county. As well as identifying the key facts on the outbound commuters, we are also interested in the *strategic value of the facts from an economic development perspective*: that is, the substantial outbound commuter population can be viewed as an opportunity to enhance the economic portrayal of the county and help attract more FDI into Meath (outbound commuters to capital cities generally have strong educational attainment and skills, and Meath is no exception to this rule, as shown presently). At the same time, we are also mindful of the inbound commuters to Meath and their educational attainment and skills – a good many of whom work in the (albeit small number of) foreign-owned or FDI companies in the county. *Owing to its favourable location next to Dublin and strong transport links, the potential labour pool available to prospective inward investment companies to Meath is vast and this was emphasised to us in our consultations during the course of the study. Along with the outbound commuter resource, this advantage, combined with the scope for Meath to be a cost-competitive investment location, will be important in helping to attract more FDI into the county during the course of the Strategy (2014-2022).*

Place of Work among Residents of Meath – Large Extent of Outbound Commuting

Table 7.22 below shows that the majority of people residing in County Meath and at work in any location do so outside the county. According to our analysis of the CSO POWSCAR data, a total of 61,391 persons resident in Meath had a fixed place of work in 2011, of which 28,449 were at work within Meath (46.3% of the total) and 32,942 were at work outside of Meath (53.7%). It turns out that Meath is one of only four local authority areas in the country in which the majority of its residents at work in any location in 2011 did so outside their place of residence in the (the three other local authority areas being South Dublin, Fingal and Dún Laoghaire Rathdown, which we would expect in any event owing to the fact that they are part of Dublin).

Outside of the capital, therefore, Meath recorded the highest outbound commuter rate of any local authority area in the country, with 54% of its residents at work in any location doing so in other local authority areas. The outbound commuting rates in Counties Wicklow and Kildare were lower than 50% and that in Louth was lower than 30% in 2011. *Proportionately speaking, outside of the capital, Meath has the biggest outbound commuter population of any county in the country.*

Table 7.22: Place of Work of People Residing in County Meath (2011)

Place of Residence	No. Persons Employed by Place of Work				Total
	County Meath	Dublin City and County	All Other Locations	Sub-Total Outside Meath (Outbound Commuters)	
County Meath	28,449	25,008	7,934	32,942	61,391
% of Total	46.3%	40.7%	12.9%	53.7%	100%

Source: CSO POWSCAR (2011), Maynooth University economic baseline study of Meath (2013) and consultancy team analysis.

Note: Fixed location jobs.

The dominance of Dublin as the place of work for Meath's outbound commuters is immediately apparent from inspection of the above table. In that year, 'Dublin City and County' (or the four local authority areas making up the Dublin Region) accounted for 25,008 of the 32,942 outbound commuters (over three-quarters of all outbound commuters in 2011) and absorbed 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%).¹⁵⁶

Clearly enough, therefore, what is good for Dublin, Louth (Dundalk and Drogheda particularly) and Kildare (including the M4 corridor on the Meath-Kildare border) is also generally good for Meath, in terms of economic development. But 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) and one wonders whether such a high rate of outward commuting is sustainable let alone desirable. *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 the Meath CDP of supporting sustainable communities.*

The publication *Council Review* (aimed at local authority personnel and others working with local authorities) carried an interview with the then (acting) County Manager (Mr. Brendan McGrath), which highlights the issues associated with such commuting. The interview refers to the greater than 50%

¹⁵⁶ With 12,642 residents of Meath working there in 2011, Dublin City was the single largest local authority work destination for the outbound commuters in that year, followed by Fingal (8,648). At 2,692 workers, South Dublin lay between Louth and Kildare in the pecking order and Dún Laoghaire and Rathdown (1,026 workers) lay between Kildare and Cavan.

outbound commuting rate and the increasing retail leakage from Meath, based on survey evidence. According to Mr. Grath, whose words are quite revealing as well as relevant:¹⁵⁷

“Those statistics are quite frightening not just for the county’s economy but also for our citizens and the lives they lead ... Imagine spending a significant part of your day commuting to work, and I am talking about couples in many instances, who are away from their families for anything up to 12 hrs ... I am also talking about people who arrive home late a night too tired to go out again into their home communities and make the contribution they would love to make to the local GAA club, the Tidy Town group, the school board of management or whatever”.

The interview-based article proceeds to discuss the CDP under development at the time (which became the current CDP) and the economic adjustment necessary to achieve it. According to McGrath:

“The county needs to be re-configured economically. Meath is predominantly a commuter county and we have to start changing that. We need to bring jobs and employment to the villages and towns where people live in order to create sustainable, vibrant communities that give hope for a better life for our citizens”.

While these words may convey a sense of wishful thinking – in that it is generally not possible to create jobs in every town and village within a location – the spirit of the piece is well-taken and it would be better for all in Meath to create jobs within the county (e.g. Kells) than to have them outside the county (revenue from rates as well as greater wage power provides an economic stimulus locally). In terms of the types of jobs envisaged, McGrath chooses his words wisely but nonetheless in a relevant way:

“We need to re-imagine a new future for Meath, a future which pays due respect to its largely rural and agricultural past while at the same time focusing on the emerging science-based employment of the future ... We need to leverage our unrivalled accessibility, highly skilled and adaptable workforce and the attractiveness of our county as a place to live. In other words, we need to recreate this new 21st century Meath while respecting the strengths and unique heritage of our past”.¹⁵⁸

Educational Attainment of People Working within and outside Meath

The analysis of the POWSCAR data presented Table 7.23 illustrates that the outbound commuters have greater educational attainment compared with those both living and working in Meath. Of the almost 33,000 outbound commuters in 2011, 41.3% had third-level or higher educational qualifications and this was higher than the corresponding figure for the State (38%).¹⁵⁹ Focusing on the 25,000 or so outbound commuters to Dublin, it is seen that the level of higher educational attainment 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). Thus, perhaps not surprisingly, the outbound commuters to Dublin represent the workers with the strongest educational attainment.

¹⁵⁷ The text for the article was seen by the consultancy team and quoted from here.

¹⁵⁸ The consultancy expresses our thanks to Meath County Council for making available the text for the *Council Review* article.

¹⁵⁹ This proportion is also evident in the earlier Table 7.17 (p. 165).

Table 7.23: Place of Work and Educational Attainment of People Residing in County Meath (2011)

Highest Level of Educational Attainment	No. Persons Employed by Place of Work						Sub-Total Outside Meath (Out-Comms)			
	County Meath	%	Dublin City and County	%	All Other Locations	%		%	Total	%
Not stated	641	2.3%	301	1.2%	125	1.6%	426	1.3%	1,067	1.7%
Secondary or lower	20,727	72.9%	14,122	56.5%	4,796	60.4%	18,918	57.4%	39,645	64.6%
Third level or higher	7,081	24.9%	10,585	42.3%	3,013	38.0%	13,598	41.3%	20,679	33.7%
Total	28,449	100.0%	25,008	100.0%	7,934	100.0%	32,942	100.0%	61,391	100.0%

Source and note: See Table 7.22.

Overall, then, there is a clear enough ranking of worker types in Meath in terms of their educational attainment, with the outbound commuters having the highest educational attainment (within which the Dublin-bound commuters have the highest of all), followed by the inbound commuters to Meath and then the people who both reside and work in Meath have the least strong educational attainment. Compared with the State (i.e. the proportion of those at work countrywide with third-level or higher educational attainment in 2011, namely 38%), those who both live and work in Meath had lower educational attainment (25% of these workers had third-level of higher educational attainment in that year), while the inbound commuters were marginally lower (37.4% had third-level of higher educational attainment) and the outbound commuters were higher (41.3% had third-level of higher educational attainment). The comparably low educational attainment among those working in Meath (28% in 2011 taking into account both those working and living in Meath and the inbound commuters) reflects the composition of employment within the county (i.e. the largely traditional mix of economic activity within the county) and the challenge for Meath during 2014-2022 is to enhance the knowledge and value added dimensions of local employment so that stronger educational attainment will be observed within the county compared with 2011. Meeting this challenge will be through a combination of assisting local enterprises within the county and attracting more foreign-owned employment through having a more compelling FDI offering that needs to be comprehensively communicated to target audiences, including IDA Ireland as well as prospective inward investors.

Socio-Economic Grouping of People Working within and outside Meath

Further manifestation of the extent of skills leakage from the county is provided in the data analysis contained in Table 7.24 below, which contains information on the socio-economic groupings of the outbound commuters. Of the almost 33,000 outbound commuters in 2011, 7,438 or 23% were classed as employers and managers. It turns out that there were substantially more employers and managers living in Meath but working in Dublin and other locations outside of the county compared with employers and managers both living and working in Meath in that year (namely the aforementioned 7,438 versus 4,230 employers and managers working within Meath). Even if we add in the additional 1,885 employers and managers in respect of the inbound commuters (Table 7.18, p. 134), it is still the case that there were more employers and managers living locally but working outside Meath than working within Meath (i.e. 7,438 as opposed to 6,115). The same finding is also true of higher professionals (2,859 living locally but commuting outside the county versus 2,089 working within the county in 2011) and it also applies to the lower professional socio-economic category – 6,086 commuting out versus 5,759 working within the county.

Furthermore, as well as there being substantially more employers and managers, higher professionals and lower professionals living in Meath but working outside the county than both living and working within the county in 2011, there were also more non-manual and manual skilled workers who were outbound commuters than both living and working in Meath in that year. All of these skills areas – employers and managers, higher professionals, lower professionals, non-manual and manual skilled – are sought by FDI and growing indigenous enterprises – and seniority or higher socio-economic grouping is not always preferable because on occasion FDI firms seek to recruit junior staff or people at the beginning of their careers, who are sometimes easier to embed in their operations than senior people.

The point being advanced here is that, taken together, the outbound and inbound commuters, along with those both living and working in Meath, represent an appreciably large labour pool for inward investment and enterprise development, and the inbound commuter group is potentially very large when the wider GDA market is factored in, along with the seamless connection afforded between Meath and the rest of the Dublin and Mid-East Regions is considered by virtue of the motorways traversing the county and their connections to the M50.

Table 7.24: Place of Work and Socio-Economic Grouping of People Residing in County Meath (2011)

Socio-Economic Group	No. Persons Employed by Place of Work									
							Sub-Total Outside Meath (Out-Comms)			
	County Meath	%	Dublin City and County	%	All Other Locations	%		%	Total	%
Employers and managers	4,230	14.9%	5,982	23.9%	1,456	18.4%	7,438	22.6%	11,668	19.0%
Higher professional	1,289	4.5%	2,141	8.6%	718	9.0%	2,859	8.7%	4,148	6.8%
Lower professional	3,856	13.6%	4,530	18.1%	1,556	19.6%	6,086	18.5%	9,942	16.2%
Non-manual	8,324	29.3%	7,499	30.0%	2,121	26.7%	9,620	29.2%	17,944	29.2%
Manual skilled	2,415	8.5%	2,129	8.5%	757	9.5%	2,886	8.8%	5,301	8.6%
Semi-skilled	3,066	10.8%	1,752	7.0%	817	10.3%	2,569	7.8%	5,635	9.2%
Unskilled	891	3.1%	388	1.6%	162	2.0%	550	1.7%	1,441	2.3%
Own account workers	1,377	4.8%	312	1.2%	152	1.9%	464	1.4%	1,841	3.0%
Farmers	1,991	7.0%	41	0.2%	44	0.6%	85	0.3%	2,076	3.4%
Agricultural workers	436	1.5%	47	0.2%	59	0.7%	106	0.3%	542	0.9%
All others	574	2.0%	187	0.7%	92	1.2%	279	0.8%	853	1.4%
Total	28,449	100.0%	25,008	100.0%	7,934	100.0%	32,942	100.0%	61,391	100.0%

Source and note: See Table 7.22.

Economic Sectors of People Working within and outside Meath

Yet further evidence of the economic leakage from Meath is apparent in Table 7.25 below. The most striking contrast between the outbound commuters and those both living and working in Meath concerns the economic sector information and communication, financial, real estate, professional, administration and support service activities. In particular, 7,771 or 24% of the outbound commuters were active in this important sector in 2011, compared with only 3,262 or 11.5% of the people both living and working in Meath. Even when the inbound commuters are added in (using the earlier data shown in Table 7.19, p. 136), the number of outbound commuters working in this key sector substantially exceeds the number of both inbound commuters and people both living and working in Meath engaged in the sector in 2011 (7,771 versus 4,683) (23.6% of the outbound commuters versus 12.1% of the people working in Meath – the corresponding figure for the State being 18.5%).

Table 7.25: Place of Work and Economic Sectors of People Residing in County Meath (2011)

Economic Sector	No. Persons Employed by Place of Work									
	County Meath	%	Dublin City and County	%	All Other Locations	%	Sub-Total Outside Meath (Out-Comms)	%	Total	%
1 Agricultural, forestry & fishing	2,670	9.4%	82	0.3%	143	1.8%	225	0.7%	2,895	4.7%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	13.2%	2,500	10.0%	1,686	21.3%	4,186	12.7%	7,947	12.9%
3 Construction	1,165	4.1%	684	2.7%	308	3.9%	992	3.0%	2,157	3.5%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	29.4%	6,856	27.4%	2,035	25.6%	8,891	27.0%	17,247	28.1%
5 Information and communication, financial, real estate, professional, administration and support service activities	3,262	11.5%	6,813	27.2%	958	12.1%	7,771	23.6%	11,033	18.0%
6 Public administration and defence; compulsory social security	1,540	5.4%	2,565	10.3%	407	5.1%	2,972	9.0%	4,512	7.3%
7 Education, human health and social work activities	5,798	20.4%	4,654	18.6%	1,982	25.0%	6,636	20.1%	12,434	20.3%
8 Other service activities	1,411	5.0%	755	3.0%	361	4.6%	1,116	3.4%	2,527	4.1%
9 Not stated	486	1.7%	99	0.4%	54	0.7%	153	0.5%	639	1.0%
Total	28,449	100.0%	25,008	100.0%	7,934	100.0%	32,942	100.0%	61,391	100.0%
HHI	1,746		2,062		1,945		1,955		1,797	

Source and note: See Table 7.22.

Note also that HHI denotes the Herfindahl-Hirschman Index of concentration – the higher the value of the HHI, the more concentrated the level of employment among the economic sectors.

Age Distribution of People Working within and outside Meath

The next table shows that substantially more of the outbound commuters (71%) are aged 20-44 years compared with those both living and working in Meath (59%).

Table 7.26: Place of Work and Age Distribution of People Residing in County Meath (2011)

No. Persons Employed by Place of Work										
Age (Years)	County Meath	%	Dublin City and County	%	All Other Locations	%	Sub-Total	Outside	Total	%
							Meath (Out-Comms)	Meath		
15-19	257	0.9%	102	0.4%	58	0.7%	160	0.5%	417	0.7%
20-44	16,849	59.2%	18,150	72.6%	5,225	65.9%	23,375	71.0%	40,224	65.5%
45-64	10,433	36.7%	6,596	26.4%	2,554	32.2%	9,150	27.8%	19,583	31.9%
65+	910	3.2%	160	0.6%	97	1.2%	257	0.8%	1,167	1.9%
Total	28,449	100.0%	25,008	100.0%	7,934	100.0%	32,942	100.0%	61,391	100.0%

Source and note: See Table 7.22.

Mode of Transport to Work among People Working within and outside Meath

Table 7.27 shows (*inter alia*) that a substantially higher proportion of the outbound commuters (87.3%) travel to work (mainly in Dublin) by private transport (car) compared with those both living and working in Meath (73.2%). The much greater proportion of home working among the latter compared with the former relates to the large proportion of farmers in County Meath. Anecdotally, among the outbound commuters, the more senior among this cohort tend to use car transport to get to work.¹⁶⁰

Table 7.27: Place of Work and Mode of Transport of People Residing in County Meath (2011)

Mode of Transport to Place of Work	No. Persons Employed by Place of Work									
			Dublin City and County		All Other Locations		Sub-Total Outside Meath (Out- Comms)			
	County Meath	%		%		%		%	Total	%
Not stated	246	0.9%	91	0.4%	60	0.8%	151	0.5%	397	0.6%
Home worker	3,088	10.9%	2	0.0%	0	0.0%	2	0.0%	3,090	5.0%
Private transport	20,821	73.2%	21,180	84.7%	7,583	95.6%	28,763	87.3%	49,584	80.8%
Public transport	314	1.1%	1,311	5.2%	44	0.6%	1,355	4.1%	1,669	2.7%
Soft modes	3,980	14.0%	2,424	9.7%	247	3.1%	2,671	8.1%	6,651	10.8%
Total	28,449	100.0%	25,008	100.0%	7,934	100.0%	32,942	100.0%	61,391	100.0%

Source and note: See Table 7.22.

¹⁶⁰ This tends to be confirmed in further analysis of the CSO POWSCAR. For example, among the 7,438 outbound commuters working as employers and managers in 2011, 6,560 or 88.2% travelled to and from work by private transport; and of the 2,859 outbound commuters working as higher professionals in that year, 2,382 or 83.3% travelled in this manner.

Extent of Outbound Commuting in Selected Settlement Areas in Meath

Finally, Table 7.28 overleaf looks at the number and composition of employment in nine (9) selected towns in Meath – as originally considered in the Maynooth University economic baseline study (2013) and further studied presently.¹⁶¹ In 2011, the 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)’ in the Maynooth University study – 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 table below also reveals which of the nine towns were the biggest commuter towns. Judged by the outbound commuter rate (i.e. the proportion of outbound commuters to the sum of outbound commuters and those living and working locally), the towns with the highest rates of outbound commuting were those closest to Dublin (spatially or transport connection-wise):

- Drogheda (South) (outbound commuting rate of 91.9%);
- Clonee (89.5%);
- Ratoath (87.3%);
- Dunboyne (85.5%);
- Ashbourne (83.1%);
- Dunshaughlin (77.2%);
- Trim (55.6%);
- Kells (53.6%); and
- Navan (46.1%).

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.

¹⁶¹ The boundaries are based on the CSO's settlements/legal towns and do not include the towns' hinterlands.

Table 7.28: Extent of Outbound Commuting from Selected Settlements in County Meath (2011)

Settlement Area	Persons Employed in Settlement Area by Place of Residen				Oubound Commuters	Oubound Commuting Rate
	Settlement Area	Other County Meath	Outside County Meath (Inbound Commuters)	Total		
Navan	3,985	3,555	1,486	9,026	3,402	46.1%
Trim	870	977	291	2,138	1,091	55.6%
Kells	464	557	365	1,386	537	53.6%
Ashbourne	647	392	400	1,439	3,190	83.1%
Dunshaughlin	256	509	264	1,029	867	77.2%
Ratoath	371	312	181	864	2,561	87.3%
Drogheda (South)	177	141	527	845	2,020	91.9%
Dunboyne	392	302	469	1,163	2,309	85.5%
Clonee	36	80	183	299	306	89.5%
Total	7,198	6,825	4,166	18,189	16,283	69.3%
Meath Total		28,449	10,373	38,822	32,942	53.7%

Source and note: See Table 7.22. See also footnote 161.

Summary of Review and Analysis of Meath's Outbound Commuters

The scale of outbound commuting is both a positive and an issue for the county – a positive because the outbound commuters can be seen as an important economic resource and an issue because the comparably large commuting out of the county on a daily basis represents a leakage in economic terms. The challenge is to harness the unique resource to encourage more inward investment into the county, along with marketing the county as being on the doorstep of a very large labour pool spanning the whole of the GDA, made smaller by virtue of the transport links within the region.

The **positives** for County Meath are summarised as follows:

- There are a large number of outbound commuters living in Meath. In 2011, the number of people residing in the county with employment outside of that location was almost 33,000.
- Of these, 41% or about 25,000 were working in the Dublin Region, given as the four local authority areas making up the capital. 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).
- The *educational attainment* of the outbound commuters is higher compared with those working and living in Meath and with the inbound commuters to the county (i.e. those working in Meath but living elsewhere). At the last census in 2011, over 41% of the outbound commuters had *third-level or higher educational attainment*, which was higher than the corresponding proportion for the inbound commuters (37%) and those both living and working in the county (25%). The 41% of the outbound commuters with third-level or higher educational attainment in Meath in that year also exceeded the proportion of people at work countrywide with such qualifications (38%).
- Among the outbound commuters, those working in Dublin have the highest educational attainment, which is perhaps not surprising: over 42% of these commuters had third-level or higher educational attainment in 2011.
- Among the 33,000 or so outbound commuters are a range of socio-economic groups, illustrating the breadth of skills available and therefore opportunities for attracting greater inward investment into the county (2011):
 - 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); and
 - 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 communication, financial, real estate, professional, administration and support service activities sector 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). This further demonstrates the skills of the outbound commuters.
- 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.

On the other hand, **issues** for Meath include the following:

- Over half (54%) of all people residing in Meath and at work in any location in 2011 did so outside of the county, with the main working destinations of the outbound commuters being Dublin (76% of all outbound commuters), Louth (10%), Kildare (7%), Cavan (3%) and Westmeath (2%).
- The only other local authorities in Ireland with an outbound commuting rate greater than 50% at the time of the last census in 2011 were South Dublin, Fingal and Dún Laoghaire Rathdown local authority areas, which we would expect in any event owing to the fact that they are part of Dublin).
- Proportionately speaking, with an outbound commuter rate of 54% in 2011, Meath was the biggest commuter county outside of the capital in that year.
- The large extent of outbound commuting from Meath is not without cost because the long hours involved in travelling to and from work, and working, mean that commuters have less time to spend with their families and have less opportunity to give back to their local communities. Given the age profile the commuters, with many of them in their 30s and early 40s, many are likely to have young families.
- The fact that there are more employers and managers, higher professionals and lower professionals living in Meath but working outside of the county than there are working within the county (whether among those both living and working in Meath or the inbound commuters to the county) exemplifies the extent of leakage from the county, where the challenge is to ensure more economic impact being retained in Meath in the coming years.

7.6 Enterprise Performance

Small Firms and Entrepreneurship

Self-Employed Income

Earlier in this section, in our examination of primary income at county level, we considered CSO data on self-employed income, which gives indication of small business performance. The graph in Figure 7.4 (p. 89) showed that, until 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. It is also apparent from the graph that, while self-employed income in Meath relative to the country as a whole fell following the onset of the crisis after 2007, there was a downward trend against Meath before the crisis – as illustrated by the fitted trend line in Figure 7.4 (bottom panel). However, the CSO data on self-employed income are just one indicator of enterprise performance and by themselves are not conclusive or definitive.

VAT Registrations

The economic baseline study carried out by Maynooth University in 2013 includes consideration of VAT registrations, which is relevant as an indicator of entrepreneurship. During 2010-2012, Meath experienced a steady increase in registrations of companies and sole traders. The number of new company registrations increased by 27% (94), while the number of new sole traders grew by nearly 80% (245). However, the increasing number of enterprise registrations was partly or largely driven by the difficult situation in the labour market during these years and we would be inclined to agree with Maynooth University in their assessment that many of the new enterprises and traders registered are

likely to have only limited viability in the long-term (as a rough rule of thumb, about 50% of all new start-ups close within 5 years of commencing – for various reasons, including lack of business/management experience and pick-up in the labour market).

Enterprise Ireland High Potential Start Ups (HPSUs)

Another indicator of enterprise performance relates to Enterprise Ireland's high potential start ups (HPSUs). EI's HPSU scheme provides funding packages to companies with the potential to penetrate export markets and create substantial jobs. Applicants need to be: (a) introducing a new or innovative product or service to international markets; (b) involved in manufacturing or internationally-traded services; (c) capable of creating 10 jobs in Ireland and realising €1 million in sales within three to four years of starting-up; and (d) led by an experienced management team.

In our consultations with EI, we were kindly provided with information on HSPUs in Meath and the two other counties in the Mid-East Region (i.e. Kildare and Wicklow) (this is a planning region for EI). An important qualification to the data is that not all HPSUs are start-ups and companies of up to six-years old may apply for funding under the scheme.

According to the information received from EI, as at May 2014, there were 164 EI-assisted companies in Meath, of which 4 or 2.4% were HPSUs and a further 16 (9.8%) were pre-HPSUs. The corresponding proportions in Kildare were 5.2% and 23% and in Wicklow were 8.1% and 15.5%. *It is evident from the information, therefore, that the proportion of EI client companies that are HSPUs or pre-HPSUs is lower in Meath compared with the other parts of the Mid-East Region.*

Table 7.29: Number of Enterprise Ireland High Potential Start Up (HPSU) Companies in Meath, Kildare and Wicklow (2014)

	Meath		Kildare		Wicklow	
	No.	%	No.	%	No.	%
No. Enterprise Ireland Client Companies	164		191		161	
Of which HPSU Clients	4	2.4%	10	5.2%	13	8.1%
Of which Pre-HPSU Clients	16	9.8%	44	23.0%	25	15.5%

Source: EI, consultancy team analysis.

Note: The EI data pertain to May 2014.

Enterprise Ireland Funding Approvals and Innovation Voucher Approvals

Further data analysis making use of other data received from EI is presented in Table 7.30 below. The first half of the table relates to the number of EI clients approved funding during 2011-2013 (not necessarily in receipt of such funding) and shows appreciable growth in Meath, and Wicklow. The bottom part of the table shows the number of innovation vouchers approved and again there was strong growth in Meath, albeit from a low base, and it is noteworthy that the number of such approvals has been lower in Meath compared with Kildare and Wicklow. The relatively low number of innovation voucher approvals in Meath may reflect the greater mix of more traditional economic activities in the county, where the need for new product development and/or process innovation might be lower.

Table 7.30: Number of Enterprise Ireland Client Funding Approvals and Innovation Voucher Approvals in Meath, Kildare and Wicklow (2011-2013)

Indicator	2011	2012	2013	Change (2011-2013)	
				Absolute	%
Number of EI Clients Approved Funding					
Meath	46	46	56	10	21.7%
Kildare	56	65	50	-6	-10.7%
Wicklow	30	28	37	7	23.3%
Innovation Vouchers Approved					
Meath	9	12	16	7	77.8%
Kildare	17	21	24	7	41.2%
Wicklow	19	17	34	15	78.9%

Source: EI, consultancy team analysis.

Note: The funding approval data do not necessarily mean that funding was received.

Employment Performance in Agency-Assisted Enterprises

The consultancy team obtained from Forfás data on (permanent full-time) employment among Irish-owned and foreign-owned agency-assisted enterprises in Meath, which we have compared with other parts of the country – namely the Dublin Region, Mid-East Region (including Meath) and the State (2004-2013). The data analysis is given in the next table below. Two trends are especially noteworthy: first is the relatively strong employment growth in Irish-owned agency-assisted firms in Meath during the whole period (2004-2013) and between 2012 and 2013 – Meath experienced the strongest rates of growth of all the locations; the second trend contrasts with the first one and is that employment growth among foreign-owned agency-assisted firms has been weak in Meath compared with the other locations (there was substantial contraction of almost 34% in employment in FDI companies in Meath during 2004-2013, in stark contrast to Dublin and the rest of the country).

Table 7.31: Permanent Full-Time Employment in Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)

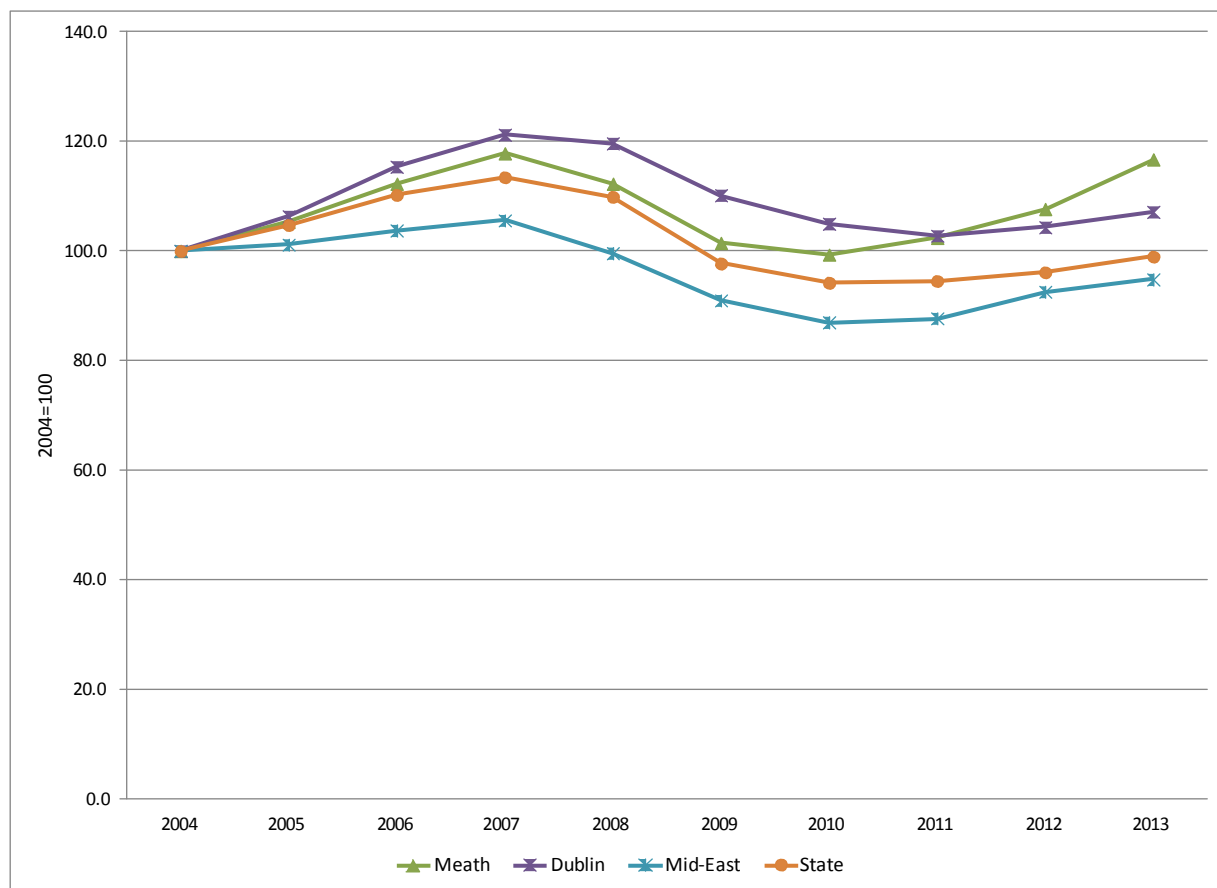
Year	Permanent Full-Time Employment in Agency-Assisted Enterprises											
	Meath			Dublin Region			Mid-East Region			State		
	Irish-Owned	Foreign-Owned	Total	Irish-Owned	Foreign-Owned	Total	Irish-Owned	Foreign-Owned	Total	Irish-Owned	Foreign-Owned	Total
2004	4,547	1,691	6,238	44,939	52,026	96,965	14,154	17,287	31,441	152,543	149,259	301,802
2005	4,789	1,714	6,503	47,781	53,545	101,326	14,313	17,021	31,334	159,776	151,723	311,499
2006	5,104	1,448	6,552	51,829	57,028	108,857	14,680	16,682	31,362	168,143	155,088	323,231
2007	5,356	1,497	6,853	54,456	57,938	112,394	14,939	19,951	34,890	173,047	155,034	328,081
2008	5,104	1,318	6,422	53,748	57,533	111,281	14,092	14,885	28,977	167,605	153,761	321,366
2009	4,613	1,163	5,776	49,494	52,894	102,388	12,875	13,093	25,968	149,051	139,860	288,911
2010	4,516	1,115	5,631	47,162	52,197	99,359	12,310	13,793	26,103	143,697	138,353	282,050
2011	4,654	1,140	5,794	46,183	55,459	101,642	12,412	13,526	25,938	144,197	142,191	286,388
2012	4,894	1,105	5,999	46,884	58,868	105,752	13,099	13,260	26,359	146,605	147,971	294,576
2013	5,306	1,117	6,423	48,130	61,193	109,323	13,417	13,290	26,707	150,966	152,189	303,155
% Change 2004-2013	16.7%	-33.9%	3.0%	7.1%	17.6%	12.7%	-5.2%	-23.1%	-15.1%	-1.0%	2.0%	0.4%
% Change 2012-2013	8.4%	1.1%	7.1%	2.7%	3.9%	3.4%	2.4%	0.2%	1.3%	3.0%	2.9%	2.9%

Source: Meath data obtained from Forfás by special request; data for Dublin, Mid-East and the State from the Forfás AES 2013, consultancy team analysis.

Illustration of the comparably strong trend in employment among Irish-owned agency-assisted firms in Meath during 2004-2013 is provided in Figure 7.17. To help compare the locations, we have converted the employment data to index number form (with 2004 set as the base year and the subsequent years expressed relative to the base year value of 100). The trend in all locations considered has been broadly the same – growth during the sub-period preceding the crash (2004-2007), contraction between 2007 and 2010 during the crisis and recovery from 2010. It is seen from the chart that employment growth in Irish-owned agency-assisted enterprises pre-crisis was most rapid in Dublin, followed by Meath but also that since 2010 employment has recovered most 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 (driven to a large extent by Meath), 2% in Dublin and 5% in the country.

Figure 7.17: Permanent Full-Time Employment in Irish-Owned Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)



Source: See Table 7.31.

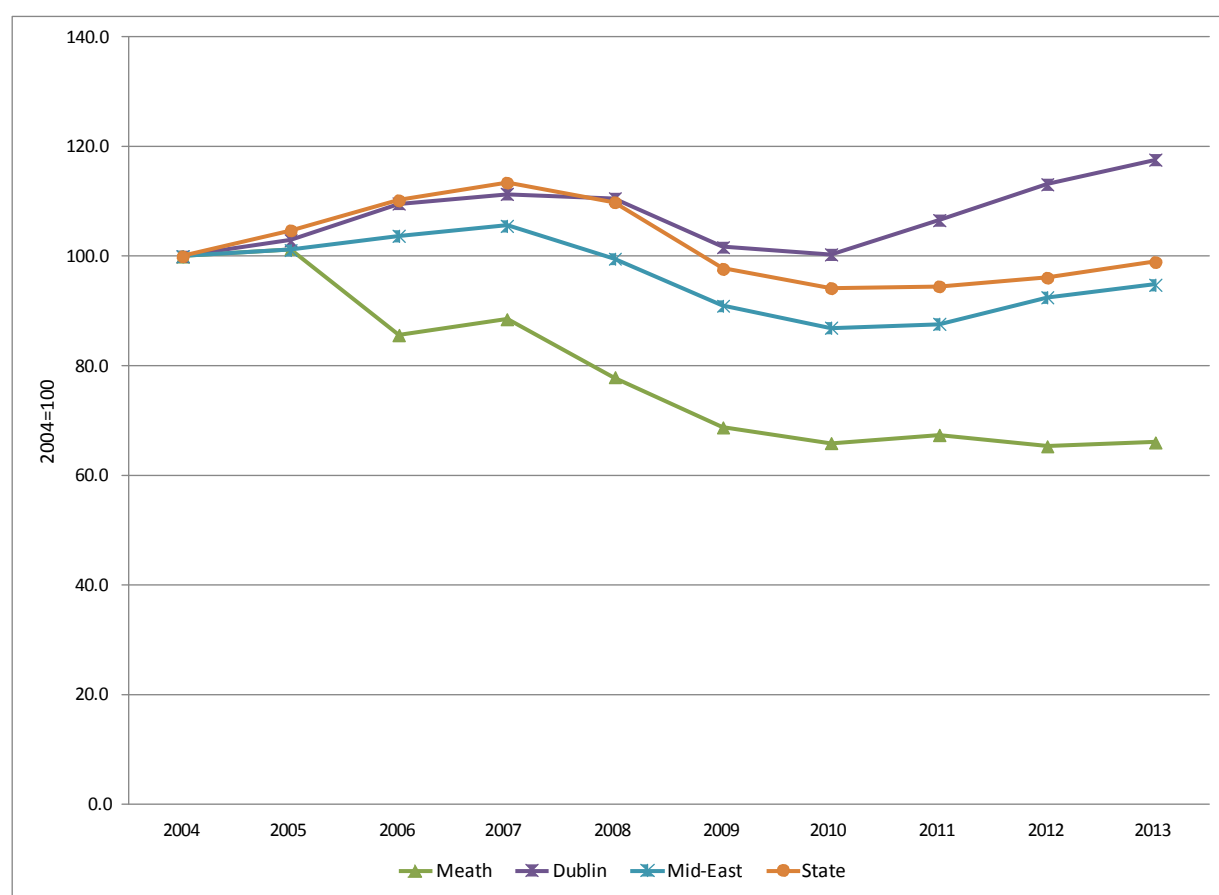
The comparably strong recovery in jobs among Irish-owned agency-assisted firms in Meath chimes with other data from Enterprise Ireland publicly available in response to Dáil Questions.¹⁶² The data in question relate to the flows of jobs created and lost among EI client firms on a county-by-county basis, from which the net jobs position can be calculated (these *flow* data may differ from the stock data considered in Table 7.31 above and Figure 7.17 below, which pertain to the *stock* of permanent full-time employees in Irish-owned agency-assisted enterprises). According to the parliamentary data, after a period of net job losses in Meath during 2008-2010, there were net gains in the number of jobs among EI client firms in the county of 162 and 321 in 2011 and 2012 respectively. In other words, between 2011 and 2012, there was almost a doubling in net jobs created among these enterprises in Meath – and the rate of growth in the county in this regard was even higher compared with Dublin (10% growth) and the country as a whole (where there was contraction of 6%).

¹⁶² Written Answer, 19 November 2013 (Reference Number 49355/13).

The relatively strong employment performance in Irish-owned agency-assisted enterprises in Meath contrasts markedly with the corresponding trends in respect of foreign-owned agency-assisted enterprises, as illustrated in Figure 7.18 below. In this regard, it is self-evident from the graph that employment in FDI firms in Meath has deteriorated significantly in Meath over the whole period (2004-2013). Nevertheless, on close inspection of the graph, the rate of decline in Meath has eased since 2010 and indeed there was marginal growth between 2012 and 2013, although from a low base.

Meath's underperformance in FDI is also apparent in the low incidence of IDA Ireland site visits to the county – Table A1 in the Annex of Supplementary Information (p. 269) illustrates this fact fairly clearly in comparison with other counties in the country during 2008-2012. One of the key challenges, if not *the* most important challenge, for the Economic Development Strategy for Meath will be to address the *FDI deficit* in the county at every stage of the process, meaning growing potential interest in the form of more site visits, job announcements and ultimately actual jobs in foreign-owned companies (i.e. converting more interest from prospective FDI companies into on-the-ground employment in Meath).

Figure 7.18: Permanent Full-Time Employment in Foreign-Owned Agency-Assisted Enterprises in Meath and Selected Other Locations (2004-2013)



Source: See Table 7.31.

A summary of FDI companies currently operating in Meath is given in Table 7.32 below. This shows that there are 14 such enterprises based in a number of locations around the county. The main areas of operation are services, although there is also some activity in high-tech manufacturing/activities – biotechnology, medical devices and some pharmaceuticals. The average size of FDI firm in the county would be less than 100 (i.e. the 1,117 permanent full-time employees shown in Table 7.32 above spread across the 14 companies).

There are two IDA Ireland Business and Technology Parks in Meath – in Navan and Drogheda. While there are some FDI tenants in these parks, the sites remain largely unoccupied: for example, there is just one tenant at the park in Drogheda (International Fund Services, which is part of State Street) and the other FDI company in Drogheda, namely Coca-Cola International Services, operates from Southgate (shopping centre) about a kilometre from the IDA park on the Donore Road in Drogheda.

Table 7.32: Summary of FDI Companies in Meath (2014)

Company	Location	Activity	Nationality
1 International Fund Services	Drogheda	Financial Services	US
2 Coca-Cola International Services	Drogheda	Shared Services	US
3 Doosan Infracore Co. Ltd	Slane	Metals and Engineering	UK
4 Europ Assistance Holdings Ltd	Navan	Insurance Call Centre	UK
5 Generali International	Navan	Investment Fund Management	US
6 Alltech Biotechnologies	Dunboyne	Biotechnology	US
7 International Paper/SIACA	Ashbourne	Paper and Printing	US
8 Generali Pan Europe	Navan	Fund Management	Italian
9 Welch-Allyn Ltd	Navan	Medical Devices	US
10 Trimfold Envelopes	Trim	Stationery	UK
11 Irish Industrial Explosives	Enfield	Explosives	France
12 Kum	Trim	Plastics	Germany
13 Franklin Pharmaceuticals Ltd	Trim	Pharmaceuticals	Netherlands
14 Nivalis Ltd.	Ashbourne	CD Packaging	China

Source: IDA Ireland, consultancy team review.

Other Data on Enterprise Performance in Meath

In 2013, Meath County Council commissioned Ipsos MRBI to carry out a survey of businesses in Meath, which was presented at the September 2013 meeting of the MEF. This is a useful and valuable piece of market research because it complements other available information on enterprises in the county.

Among the findings of the survey are: the predominance of micro firms (80% of respondents employed 10 persons or fewer, which is line with the figure for the country as a whole); and the low incidence of online selling (which is also a feature nationally).

Perhaps the most telling finding of the survey, in our view, is the results on enterprises' satisfaction with local services in Meath (something that can be controlled to an extent by Meath County Council). More specifically, the survey suggests that the services requiring most attention from an enterprise development perspective are:

- Roads (non-motorway/national);
- Broadband;

- Water supply;
- Wireless communication;
- Digital networks.

While of less importance in the survey, the results also suggest dissatisfaction among enterprises with planning, public transport and conference facilities.

In our consultations with enterprises in Meath (Irish-owned and foreign-owned), we were informed of the following:

- 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);
- Location is less important for people who are career-focused and the employer/company is more important in this regard;
- Skilled and well-trained professionals are interested in taking up employment closer to their homes versus commuting to Dublin and some of the larger indigenous companies and foreign-owned employers have recently recruited people who were commuting in this way;
- In regard to working with Meath County Council, while the experiences are generally positive, some companies said that they could benefit more from a more structured relationship (e.g. advice on services, compliance and best practices in other locations);
- The enterprises are generally satisfied with the State enterprise agencies – EI for Irish-owned firms and IDA Ireland for FDI firms;
- Nevertheless, we were also informed that there may be an opportunity for Meath County Council, the State agencies and/or the Meath Economic Forum to liaise with government nationally to address evidence-based issues (e.g. broadband as identified with the business survey outlined above);
- In regard to Meath itself, some companies felt that the county needs to play on its unique strengths and not necessarily seek to replicate what has been achieved in other counties, like Dublin and Louth, for example.

Summary

We have a clear enough view about enterprise performance in Meath from our analysis and assessment. In regard to indigenous enterprises, Meath performs relatively strongly, especially in regard to agency-assisted firms under the remit of EI. For example, the 4,654 permanent full-time employees in Irish-owned agency-assisted enterprises in the county in 2011 represented 12% of the 38,822 persons at work in the county in that year (compared with 8% for the State). The strong growth in such employment in Meath since 2010 illustrates certain strengths in manufacturing, engineering and mining in the county. Saying that, other data considered show that high value added activities – even among indigenous enterprises – may be comparably low in Meath (exporting and/or innovation) and the challenge for the Economic Development Strategy will be to grow this aspect of enterprise performance, whilst at the same time maintaining Meath comparative strengths in the activities highlighted.

On the other hand, however, Meath is not a location with a high density of foreign-owned employment and the trend over time has been downward (albeit with some marginal improvement 2012-2013). The 1,140 permanent full-time jobs in foreign-owned firms in 2011 represented less than 3% of the 38,822 persons at work in the county in that year – in contrast to the corresponding proportion of 8% for the country as a whole. The proportion of FDI employment in Meath is less than half that countrywide.

7.7 Tourism

National Trends

In the past few years, media reports have carried news stories about Ireland's improving inbound visitor numbers and some commentators have attributed the recovery in tourism to particular policy initiatives, including the reduction in the VAT rate on certain tourism-related products and services. It is likely that a combination of factors have accounted for the recovery in tourism, including the promotional activities of Fáilte Ireland and the strength of sterling against the euro – given that GB is Ireland's single largest market – not to mention lower accommodation prices (hotels) falling the crash.

Tourism is found to contribute significantly to the economy. Estimates from Fáilte Ireland suggest that every €1m in tourism expenditure supports 36 FTE jobs. This estimate is a top-line figure common across all source markets, meaning that it covers overseas, domestic or NI expenditure.¹⁶³

Overseas trips to Ireland by non-residents have recovered strongly since 2010 and in 2013 the number of such trips reached almost 7 million, exceeding the 6.9 million figure observed in 2009 (CSO data). The balance between inbound and outbound trips has turned in Ireland's favour since 2011 and the net positive number of inbound trips has grown strongly from 212,000 in 2011 to 663,000 in 2013.¹⁶⁴

Overview of Meath's Tourism Performance

Meath's tourism performance in recent years has generally been positive and represents an activity that can be built upon – in a niche manner, where the evidence suggests a focus on heritage/cultural tourism and family-oriented visits. Our analysis below includes examination of Fáilte Ireland data on the county's main tourist attractions and this has grown impressively in recent years – the Tayto Park facility near Ashbourne has been a resounding success (in terms of visitor numbers). It is also observed that while Meath is a relatively small county in respect of the number of visitors and their expenditure, when judged by *expenditure per visitor* Meath is one of the leading counties, which suggests that visitors to the county tend to be relatively high spenders. The challenge in the coming years is to continue the promotion of Meath's visitor attractions – nationally, island-wide and internationally – including the Boyne Valley as one of Fáilte Ireland's signature destinations. At the same time, it will be important to ensure a large and varied range of attractions for visitors and that they are continued to be promoted in all markets. Our data analysis below also reveals that the stock of accommodation in Meath is low (as a percentage of the total countrywide) and this is especially apparent in respect of hotel accommodation. Nevertheless, this may not be a significant issue owing to the county's favourable location in respect of Dublin (Ireland's dominant visitor destination) and the fact that stays in Meath tend to be lower than average (e.g. day visits to attractions of historical interest and family days out to Tayto Park, which has become in the space of a few years one of the country's largest visitor attractions).

¹⁶³ Estimates from PMCA Economic Consulting suggest that every job created or sustained in the travel and tourism services activities sector in Ireland leads to the creation or sustenance of 1.27 jobs (FTEs) elsewhere in the economy – Type II multiplier (which includes household as well as intermediate supply chain effects).

¹⁶⁴ In the period May-July 2014, according to the latest available data at the time of drafting this report in August 2014, the total number of trips to Ireland increased by 11.1% to 2,315,700 – an overall increase of 231,100 compared to the same period twelve months earlier. Trips by residents of North America to Ireland increased by 16.6% to 488,100 while trips by residents of GB increased by 8.5% to 836,700. Trips by residents of European countries other than Great Britain increased by 9.7% to 833,800 while trips to Ireland from other areas increased by 16.8% to 157,300. The CSO data are available at <http://www.cso.ie/en/releasesandpublications/er/ot/overseastravelmay-july2014/>.

Meath's Share of Overseas Visitor Numbers and Expenditure

An analysis of Meath's share of overseas visitor numbers and revenue for 2012 is provided in Table 7.33 below. In that year, there were a total of 122,000 overseas visitors to Meath, representing 1.2% of the national total. At the same time, total revenue among the overseas visitors to the county was €44m, which accounted for a slightly higher proportion of the national total (1.5%).

It is self-evident, then, that Meath is a relatively small county from an overseas visitor perspective, with its share of numbers or revenue less than its share of the population (which was 4% in Census 2011).

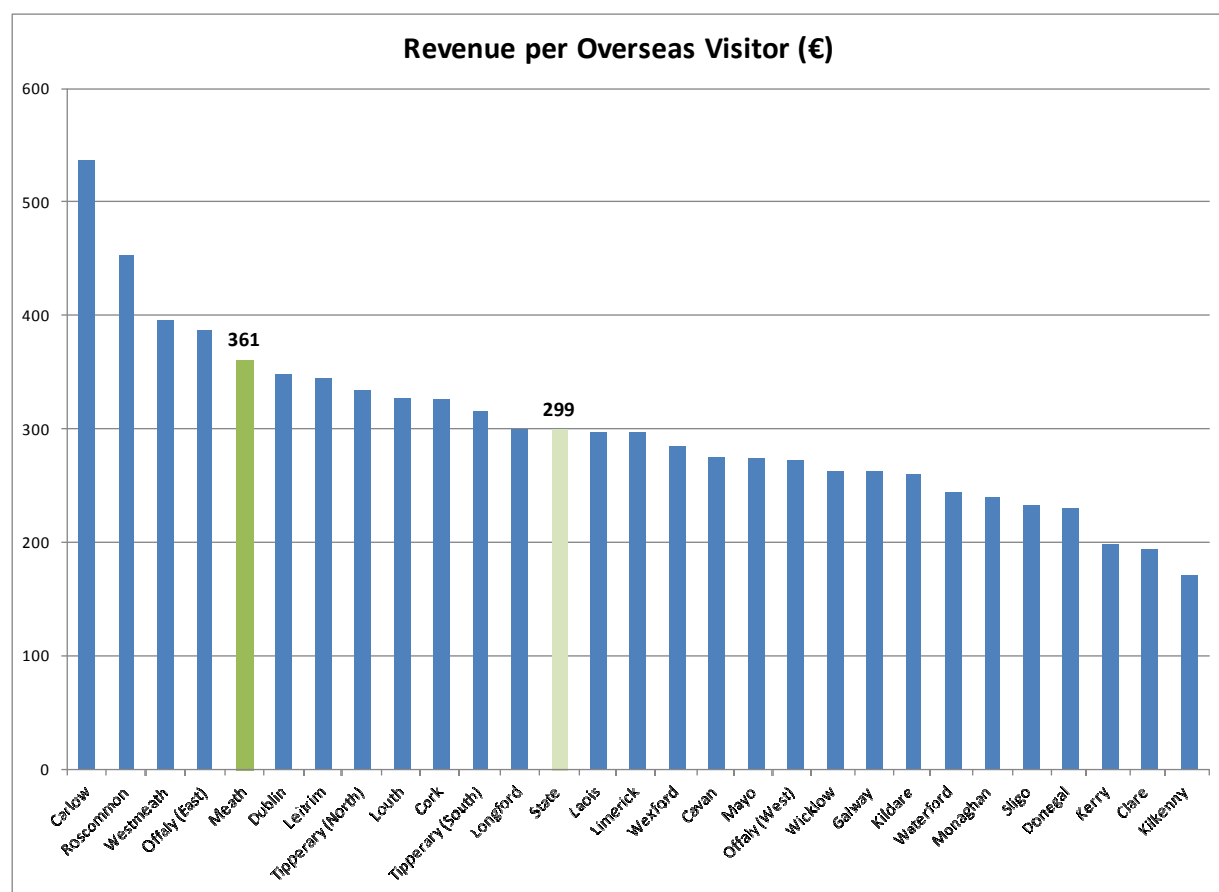
Table 7.33: Overseas Visitors to Ireland County-by-County (2012)

County	Overseas Visitors (000s)		Revenue (€m)	
	Total	% of Total	Total	% of Total
Carlow	69	0.7%	37	1.3%
Cavan	80	0.8%	22	0.7%
Clare	445	4.5%	86	2.9%
Cork	1,228	12.4%	399	13.5%
Donegal	174	1.8%	40	1.4%
Dublin	3,641	36.9%	1,267	42.8%
Galway	968	9.8%	253	8.6%
Kerry	826	8.4%	164	5.5%
Kildare	139	1.4%	36	1.2%
Kilkenny	211	2.1%	36	1.2%
Laois	37	0.4%	11	0.4%
Leitrim	29	0.3%	10	0.3%
Limerick	391	4.0%	116	3.9%
Longford	20	0.2%	6	0.2%
Louth	92	0.9%	30	1.0%
Mayo	245	2.5%	67	2.3%
Meath	122	1.2%	44	1.5%
Monaghan	46	0.5%	11	0.4%
Offaly (East)	31	0.3%	12	0.4%
Offaly (West)	11	0.1%	3	0.1%
Roscommon	42	0.4%	19	0.6%
Sligo	129	1.3%	30	1.0%
Tipperary (North)	51	0.5%	17	0.6%
Tipperary (South)	124	1.3%	39	1.3%
Waterford	225	2.3%	55	1.9%
Westmeath	81	0.8%	32	1.1%
Wexford	229	2.3%	65	2.2%
Wicklow	191	1.9%	50	1.7%
Total	9,877	100.0%	2,957	100.0%

Source: Fáilte Ireland, consultancy team analysis.

Nonetheless, while Meath may account for a relatively small proportion of overseas visitor numbers and overseas visitor revenue, when looked at in terms of *revenue per overseas visitor* the county performs comparably well. This is evident in Figure 7.19 below, where it is seen that 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. This suggests that the county performs well in the type of tourism to which it is suited and that it would be sensible to develop these niche strengths in the coming years. It is also seen from the graph that Carlow performed strongly in terms of revenue per overseas visitor in 2012, reflecting proactive promotion of the county as a short-breaks destination with luxury accommodation and fine dining. The success also observed in Roscommon, Westmeath and Offaly (East) reflects their taking advantage of the River Shannon and river/lakes-based activities (often taking in all three counties in a joined up manner). In this regard, it is noteworthy that the Boyne Valley is a shared resource between Meath and Louth County Councils and there has been Louth-Meath promotion of the public good, maintained by both local authorities.

Figure 7.19: Revenue per Overseas Visitor (€) in Irish Counties (2012)



Source: Fáilte Ireland, consultancy team analysis.

Tourism Infrastructure

Visitor Attractions

Generally speaking, visitors to a location can never have too many attractions to see and/or experience and successful visitor locations tend to have a large and varied range of attractions to keep their guests occupied and active.

The next table below shows the total number of visitors to Meath's main visitor attractions during 2008-2012 (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% per year during 2008-2012. Further data obtained from Fáilte Ireland reveal that the number of visitors to Tayto Park grew to 435,000 in 2013 and now that attraction ranks in the top 5/6 of the country's visitor attractions, which are all in Dublin, apart from the Cliffs of Moher Visitor Experience in County Clare. 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 attraction. It is also seen in the table that the Battle of the Boyne site at Oldbridge did well in 2012.

Table 7.34: Leading Visitor Attractions in County Meath (2008-2012)

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

Source: Fáilte Ireland, consultancy team analysis.

Note: Visitors include residents in Ireland and NI visitors as well as overseas visitors.

Serviced Accommodation

Another important part of tourism infrastructure is serviced accommodation. Table 7.35 below summarises the number of hotel, guesthouse and B&B beds in Meath in 2013, in comparison with the country as a whole in that year (guesthouses are basically larger B&Bs). Compared with the State, it is noticeable that the distribution of serviced accommodation in Meath is more evenly distributed between hotels and B&Bs/guesthouses; whereas elsewhere in the country, serviced accommodation features a much higher proportion of hotel beds.

It is also seen that Meath's share of the national total of hotel beds is low at just 0.5%, while its share of guesthouse/B&B beds is higher at 1.7%, suggesting that there may be a deficit of hotel accommodation in the county.¹⁶⁵

Table 7.35: Serviced Accommodation in Meath (2013) – Hotel, Guesthouse and B&B Beds

Serviced Accommodation Beds	Meath	% of Total	State	% of Total	Meath % of State
Hotels	736	65.2%	134,500	85.1%	0.5%
Guesthouses and B&Bs	393	34.8%	23,511	14.9%	1.7%
Total	1,129	100.0%	158,011	100.0%	0.7%

Source: Fáilte Ireland, consultancy team analysis.

Note: Details of Meath's and the State's hotel and guesthouse/B&B accommodation are given in Table A4 (p. 281) and Table A5 (p. 281).

Other Observations on Meath Tourism

Our overall assessment of Meath tourism is that it is generally performing well and growing, and therefore having more economic impact. Its strengths include proximity to Dublin and good roads and transport infrastructure, plus a varied range of visitor attractions, which include the now very popular Tayto Park in the south of the county. 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 family/day outs etc. 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.

Taking advantage of new opportunities in tourism may well depend on extending the stock of hotel accommodation in the county. An example of such an opportunity relates to the hosting of major events, which Fáilte Ireland is seeking to develop further. These include major international sporting events like golf and horse racing, and we are cognisant that Meath successfully hosted the Solheim Cup at Killeen Castle in 2011 and this year 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.

Fáilte Ireland has identified that the best way to approach and win major events for Ireland is to identify an Irish member of an international association/society/union/federation who agrees to become a 'Sports Ambassador' for Ireland. To assist with this process, Fáilte Ireland has developed a Sports Ambassador Programme which aims to help those who can influence international federations to hold their major events in Ireland with both practical and financial supports. As part of the initiative, Fáilte Ireland is in a position to support Sports Ambassadors with their bids, site inspections for international key decision-makers and general marketing of the event when it is won for Ireland.

As part of the tourism development process in Meath, we believe that the county should seek to liaise with and plug-in to Fáilte Ireland in this regard in the same way as we will recommend that the county (Meath County Council and the Meath Economic Forum) should plug-in with IDA Ireland and Enterprise Ireland in regard to the promotion and development of FDI and indigenous enterprises in the county.

¹⁶⁵ Table A4 (p. 298) gives further details about the stock of hotel beds in Meath and the State in 2013 and Table A5 (p. 298) does likewise in respect of B&B and guesthouse beds.

Box 7.4: Praeger on Meath and the Boyne Valley

One of the most distinguished scholars of his generation, Robert Lloyd Praeger's (1865-1953) celebrated book, *The Way That I Went* (first published in 1937), continues to be an important source of information on the natural history of Ireland. The book includes some commentary on Meath and the Boyne Valley.

On County Meath, Praeger observes that (p. 292):

"Meath is a grand county – large fertile, well wooded, well populated. It is the finest cattle country to be found in Ireland ... The principal towns lie on the [Boyne], and most of the biological and archaeological interest of Meath, as well as most of its scenic beauty, is associated with the course of the Boyne. The county has a short but attractive coastline fronting the Irish Sea, with much to interest the biologist".

On the history and heritage surrounding the county, at page 296 Praeger duly recognises Meath position among the counties of Ireland but at the same time seems to hold back when he states that (in fairness to him, this comes after his account of Newgrange and other pre-Christian sites):

"Meath is also rich in Christian remains, as would be expected in so favoured an area; but these are well known, and I need not indulge in platitudes concerning them: Mellifont, Monasterboice, Kells, Trim..."

On the Boyne, Praeger states that (p. 293):

"No river in Ireland offers a combination of scenic beauty and historical interest to compare with the Boyne".

On Newgrange, Praeger observes (pp. 293-4 and p. 296)

"The immense tumulus of Newgrange, is the finest thing of its kind in western Europe – a great cairn of stones, nearly a hundred yards in diameter at the base and some fifty feet in height at its flattish top...Nor is Newgrange all that Brúgh-na-Bóinne has to offer. There is the smaller but still imposing tumulus of Dowth less than a mile away, with many similar sculptured stones; also that of Knowth, so far merely scratched at, even more richly furnished with inscribed stones than Newgrange itself".

Dr. Praeger's scholarship and integrity were recognised in the highest scientific circles and were rewarded by the conferment of many honours – he was a member of the Council of the Royal Dublin Society and received honorary doctorates from Queens University Belfast, Trinity College Dublin and the National University of Ireland.

Source: The Way That I Went (Robert Lloyd Praeger, 1947 edition).

7.8 Economic Infrastructure

Transport

The motorway and national primary roads traversing Meath (M1, M2/N2, M3/N3 and M4/N4), and their connection with the M50 Dublin orbital route, are one of the major assets of the county and a USP for promoting the location as a base for FDI – they facilitate access to national markets and with international markets by virtue of their links with Dublin Airport and Dublin Port; and they also serve to expand the labour pool from which employers and prospective employers (including FDI firms contemplating investing in Meath) may recruit. The transport infrastructure enables seamless connectivity between Meath and the rest of the GDA. While some issues may be relevant with regard to secondary roads in the county – and we would refer back to the recent survey of businesses in the county considered at the September 2013 meeting of the MEF – road transportation is not considered to be a limiting factor in the economic development of Meath (nevertheless, the County Council should ensure that the road hierarchy is maintained and not liable to become imbalanced and to impinge negatively on small businesses reliant on secondary routes in the county).

Water

While improvements in water services have been made, reflecting investment to date, there should be no doubt or risk concerning the capacity of the county to accommodate a large data centre-type investment – given the importance of water services to such investments. Ideally, Meath should be in a position to accommodate an Intel-type FDI company requiring large volumes of water daily and any current issues in this regard should be tackled as a matter of priority. The transition from Meath County Council to the recently created Irish Water, which will be responsible for servicing water in the county, needs to be carefully managed to ensure that any such investment issues are properly addressed and that there is no doubt about the capacity of the county to accommodate ‘big wet’ industries.

Energy

The same comments apply to energy/power (electricity and gas), which has been considered by the MEF and that energy is not a limiting factor in regard to economic development in Meath

Broadband

The availability of high-speed broadband has been signalled as an issue by businesses in Meath, as reported above in regard to the recently conducted survey that was considered in the September 2013 meeting of the MEF. A particular challenge is the rollout of broadband in rural areas or areas with low population density. The recently reshuffled Cabinet has put this as high priority and it is important that the rollout of fibre broadband in rural areas is tracked as well as in urban areas.

Innovation-Enabling Infrastructure

While there are no HEIs – universities or IoTs – located in Meath, we do not believe that their absence is a significant impediment to either FDI or indigenous enterprise development in the county. This is because of Meath’s proximity to a large number and varied range of third-level institutions in the GDA and in neighbouring counties (including DkIT in Louth and AIT in Westmeath), which we have assessed earlier in our outline of educational attainment. Nevertheless, it will be important that businesses in the county are well informed of supports available (including, for example, the innovation voucher scheme) and we believe that Meath County Council and the MEF can facilitate this in liaising with the enterprise support agencies (IDA, EI and MLEO) to ensure that businesses that might need support know where they can go or that they can sign-posted accordingly.

Strategic Sites and Workspaces

In the next section and in Section 9, our spatial analysis entails consideration of a number of sites for economic and employment development around the county, including for the purpose of attracting more FDI into the county. Some of the sites are more deliverable than others and some will be more suited to FDI-type activities.

As well as these sites, we will also recommend that Meath County Council takes an even wider approach to cater for the different types of inward investment companies these days, including first-time multinationals as well as Irish-owned businesses looking for more workspace (closer to main markets) (but also competitively priced). In this regard, we will be recommending in Section 9 that a list of all available workspaces (office, commercial, industrial) for new tenants is drawn up and maintained regularly so that companies can be matched to appropriate property solutions, including FDI companies. This will also put Meath County Council in a better position to respond quickly to new opportunities as they arise and it will also be helpful in regard to the Council’s dealing with IDA Ireland having the aim of enhancing the promotion of the county as an inward investment location.

7.9 Summary – SWOT Analysis of the Local Meath Economy

In light of the detailed, focused economic profile of County Meath, we now have a very good overall impression of the structure and performance of the local Meath economy. This understanding is summarised in the SWOT analysis presented overleaf in Box 7.5. Sometimes SWOT analyses can be trite or presented meaninglessly with little or no regard for relevant evidence. The SWOT presented here seeks to reflect the economic facts and is presented from the perspective of the *relative* strengths, opportunities and weaknesses of Meath; while the threats identified are somewhat more general – although there are certain threats that Meath County Council and the MEF can take steps to help minimise (including in relation to ensuring cost-competitive local services for business and investment).

In regard to strengths, Meath is fundamentally a prosperous county in which primary income exceeds disposable income, and the county is in a small elite club in this regard: Dublin, Kildare and Wicklow, plus Meath, are the only counties in which, in 2011, primary income exceeded disposable income and these counties were also the locations with the highest employment rates, according to CSO data. The strong performance of Meath's larger indigenous enterprises (agency-supported) is also noteworthy (in terms of their contribution to all jobs in the county and jobs growth) and the county has innate comparative advantages in certain sectors, including primary agriculture, engineering, mining and quarrying and in transport, storage and distribution plus wholesale and retailing. The county's large commuter population is also a strength as well as an issue; but most importantly should be seen as an opportunity to enhance inward investment in the coming years, combined with the fact that Meath's favourable location next to Dublin and strong transport links with the capital's transport networks means that prospective investors have a vast labour/skills pool from which to recruit.

Turning to weaknesses or issues, the two principal ones are low educational attainment and low FDI. The former reflects the traditional mix of economic sectors in the county – in which activities are generally locally or domestically traded and the extent of exporting and innovation tends to be low. There is also a higher reliance on non-market or public sector employment in Meath compared with the State. However, as the economic base of the county broadens and more knowledge-oriented activities become available in the coming years, as the Strategy is successfully rolled out, we expect educational attainment to improve. Another source of our expected improvement in educational attainment stems from the outbound commuters who have settled in the county over the past decade or so. These workers have strong educational attainment and are likely to have strong educational and career expectations for their children; most of whom we expect will progress to third-level in the footsteps of their mothers and fathers, in turn leading to significant improvement in educational attainment in the county during the medium term. On FDI, while Meath benefits significantly from a number of very welcome and important foreign-owned employers around the county, as a proportion of all employment in Meath, FDI is comparatively low in the county. Furthermore, site visits by prospective inward investors are low and Meath has tended to feature rarely in IDA Ireland job announcements. This reflects the absence of a compelling FDI plan for the county and the paucity of investment-ready sites and property solutions for potential investors; and there has been a lack of proactive communication between the county and the IDA in seeking to improve FDI.

On the other hand, there are significant opportunities for the county in the coming years, including in regard to improving Meath FDI proposition and ensuring more high quality economic impact within the county. The commuter population, favourable location and transport links with the rest of the GDA, giving rise to a huge potential skills pool, needs to be a central part of this, along with ensuring investment-ready sites and property for FDI-type activities in order to broaden the economic base in favour of high value activities. Being a *cost-competitive location* also needs to be a theme for Meath.

Box 7.5: Summary SWOT Analysis of the Local Meath Economy**Strengths**

- Fundamentally prosperous county by primary income
- High labour force participation and employment rates
- Sectors where employment in Meath is more concentrated or has grown more rapidly compared with elsewhere in Ireland include agri-food (primarily beef and dairy farming), mining and quarrying, manufacturing and engineering, transport, storage and distribution, wholesale and retailing, and banking and financial services
- Tourism in the county is also growing
- Performance of Irish-owned agency-assisted firms – proportion of all employment and recent jobs growth
- Outbound commuters – unique and important asset in respect of their educational attainment and skills
- Proximity to Dublin and radial transport corridors (M1, M2, M3 and M4) connected to the M50 mean vast potential labour pool
- Cost-competitive location – rents, average salaries etc.

Weaknesses/Issues

- Long-term (over a decade) decline in self-employed income, reflecting deteriorating small business performance relative to the rest of the country
- Pro-cyclical local economy driven to a large extent by Dublin (also an opportunity for the county)
- Low FDI (nonetheless, the existing FDI firms provide very high quality employment locally and demonstrate Meath's capacity to accommodate FDI)
- Many of the sectors in which employment in Meath is relatively focused or which have experienced employment growth are also traditional activities largely concentrated in local or domestic markets
- Low third-level or higher educational attainment – this is apparent in different guises, namely among all residents, residents of working age and among those at work *within* the county (where there is a large gap in the proportion with third-level or higher educational attainment between Meath and the State, namely 28% v 38% respectively)
- The lower educational attainment among those at work within Meath compared with the country as a whole reflects the relatively low educational attainment of those *both working and living within the county* and also the more traditional mix of sectors/activities in Meath
- Smaller concentration of employment in information and communication, financial, real estate, professional, administration and support service activities compared with elsewhere in Ireland and Meath also tends to be more reliant on public sector or non-market employment

Opportunities

- Local economy that tends to perform pro-cyclically (driven in large part by Dublin) (but this is also an issue in times of downturn/recession)
- EU Regional Aid Map 2014-2020, which includes Kells and environs in the north of Meath (with a population of almost 29,000) – new FDI opportunity for Meath
- While the extent of third-level or higher educational attainment is relatively low in Meath, we expect it to improve owing to (a) commuters' children proceeding to third-level (following their parents) and (b) economic recovery and broadening of the economic base
- The universities and IoTs on the doorstep of Meath, which account for a large proportion of all students (including international students) and staff engaged in research and commercialisation countrywide
- Outbound commuters – FDI opportunity
- Favourable location and transport links – vast labour pool from which FDI firms may recruit competitively

Threats – Various Levels

- *Wider economic* – for example, the 'political cycle' in the next 12-18 months might see 'own goals' in economic policy like those which preceded the crash after 2007; and upward pressure on costs and prices are becoming apparent in the autumn of 2014
- *Institutional* – for instance, the reforms accompanying Putting People First and the LCDC/LECP structures are complex/cumbersome and likely to absorb much time among local authorities, to the extent that they risk slowing down and/or complicating the application of the Economic Development Strategy for Meath (this is not to mention the other components of the local authority reform process underway, such as funding reforms etc.)
- *Infrastructural* – shortage of investment-ready sites for inward investment or delays in their delivery during the period of the Strategy (2014-2022); lack of readiness with certain key infrastructure and services, such as water, for certain types of activities
- *County* – greater competition from other counties and locations across the country (e.g. Galway, Limerick, Waterford/South East Region, Kerry etc.).

Source: Consultancy team review and analysis.

8 The Economic Vision and its Spatial Expression for Meath

8.1 Introduction

Having considered the evidence on the local economy of Meath, and particularly mindful of its comparative strengths and opportunities, we now set out the Economic Vision for County Meath, or the ‘economic prize’ that can be gained by 2022. Formulating an appropriate vision that is both ambitious and achievable will help to focus the personnel and resources available to Meath County Council (which will have overall responsibility for the Economic Development Strategy) on achieving the vision, which is outlined here in terms of the number of jobs, the sectors in which they will occur and the centres where they will occur (reflecting the settlement/economic hierarchy in the Meath CDP 2013-2019, as varied).

The structure of this section of the report is as follows:

- Sub-Section 8.2 states the high-level features of the Economic Vision for Meath in 2022;
- The methodology used for formulating the Economic Vision is outlined in Sub-Section 8.3;
- Then, in Sub-Section 8.4, we present the analysis underlying the details of the specification of the Economic Vision, which proceeds in four stages;
 - Statement of the *baseline* employment situation in Meath
 - *Inputs* to the employment projections for Meath at 2022, which incorporate
 - National economic projections
 - Sectoral and sub-sectoral opportunities and growth prospects
 - Assessment of sites with the potential to be developed during 2014-2022
 - *Outputs* in the form of the employment projections, comprising three scenarios
 - Central or ‘likely’ scenario
 - Optimistic scenario
 - Pessimistic scenario
 - Further validation of the employment projections in 2022 – using official population projections – to ensure that the employment projections are resilient and robust, and given the overall goal of the Meath CDP to ensure sustainable communities
- Finally, Sub-Section 8.5 summarises the main results of the section.

The three economic scenarios are in line with the terms of reference for the study, which asked that the consultancy team consider two alternative economic/employment scenarios (optimistic and pessimistic) in addition to a central or likely scenario. The terms of reference also requested that we consider two additional scenarios to cater for planning policy, namely (a) the possibility that an additional area of Meath, including Ashbourne and its environs, would come under the existing Metropolitan Area of Meath (illustrated earlier in the map on Figure 3.2, p. 54), which currently includes Dunboyne and environs, and (b) maintenance of the *status quo* (i.e. no change to the existing Hinterland and Metropolitan Areas of Meath). To the extent that a larger Metropolitan Area would serve to enhance the attractiveness of the sites concerned, other things being equal, we consider that this additional planning scenario would make the optimistic scenario more likely, *ceteris paribus*. However, we do not believe that Meath County Council should invest time and effort into the possibility of seeking a larger Metropolitan Area of Meath for various reasons, including (i) it would merely deflect resources from potentially more productive uses and (ii) it might well be put back to the county as to what use it has made to date of the existing Metropolitan Area. A more productive action, in our view, would be to exploit the existing Metropolitan Area of the county by facilitating the employment development of the area (owing to its significant employment potential in the M4 corridor).

8.2 Statement of the High-Level Characteristics of the Economic Vision

Overall Vision for County Meath in the CDP 2013-2019 (As Varied)

The overall vision for Meath in the CDP (as varied) is clearly stated in the Core Strategy of Volume 1 of the CDP (p. 11):

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

The vision is to be supported by a number of core principles, including “Core Principle 1 – To develop Meath’s critical role in the Dublin and Mid East Region and its role as part of the Dublin City National Economic Gateway maximising on its proximity to Dublin Airport” (p. 11 of the CPD). Among the twelve core principles contained in the CDP are the promotion of sustainable economic development to support the population of County Meath (Core Principle 3) and the consolidation of population growth and employment in areas best served by public transport and a range of transport modes (Core Principle 9). The agri-food sector and the heritage tradition in Meath are also included among the core principles (Core Principle 7 and Core Principle 4 respectively).

While the vision for the county annunciated in the CDP is necessarily and understandably mindful of the position of Dublin as the National Gateway, and Meath’s role as a key part of the gateway, the Economic Vision under consideration here should not seek to be passive and should not, in our view, and in the views of the stakeholders with whom we consulted, fall into the trap of facilitating (inadvertently or otherwise) further development of the county along the lines of a satellite or dormitory location in respect of the capital. Meath is currently the largest commuter county in the country, proportionately speaking – over half of its residents at work in any location do so outside the county. While commuting will continue to be a part of life in Meath in the foreseeable future, the challenge is to retain more economic impact locally and therefore addressing the leakage of high value employment from the county to Dublin (primarily) should feature the outbound commuters themselves, who we believe can be harnessed to help raise the attractiveness of Meath as an inward investment location.

Proposed Economic Vision for Meath

The Economic Vision set out here, and to which the actions in the next section of the report will be targeted, needs to be *ambitious*, while at the same time *achievable*.

The tenets of the Economic Vision are presented in the table overleaf and, in designing them, we have been mindful of the overall vision for County Meath stated in the CDP.

The Economic Vision seeks to portray a sustainable outlook for the county from an economic development perspective and one which will support the wider goal of supporting sustainable communities throughout Meath.

Table 8.1: Tenets of the Economic Vision for County Meath

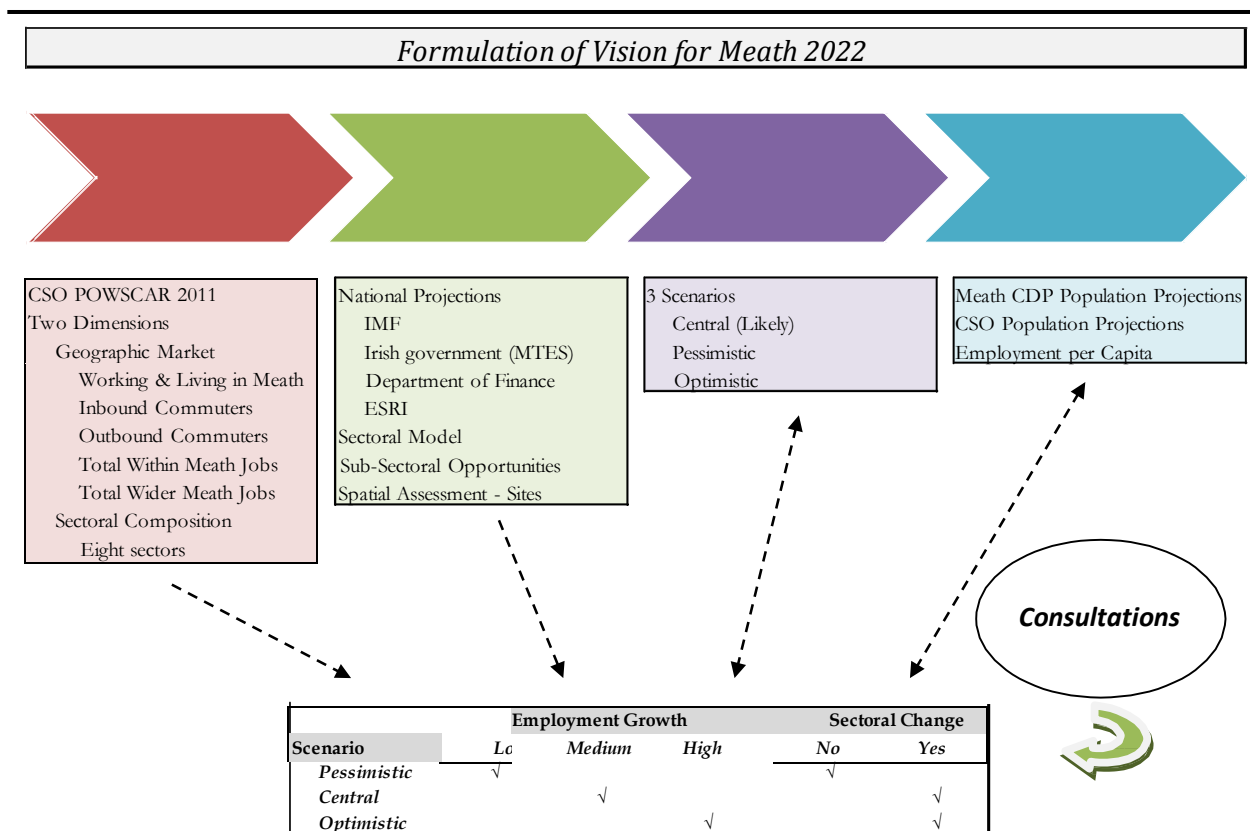
1.	<i>A flourishing, innovative and cost-competitive location in the heart of the National Gateway that is recognised locally, nationally and internationally as a highly attractive and distinctive centre in which to conduct business.</i>
2.	<i>Seamless access to skills, infrastructure and services, and markets (international and national).</i>
3.	<i>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.</i>
4.	<i>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.</i>
5.	<i>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.</i>
6.	<i>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.</i>
7.	<i>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).</i>

Source: Meath CDP 2013-2019 (as varied); consultancy team review and analysis.

8.3 Methodology for Formulating the Economic Vision

Graphical illustration of our methodological approach to formulating the Economic Vision for Meath is presented in Figure 8.1 below. The formulation of the Economic Vision proceeds in four steps:

- Baseline employment – which we have already established in Section 7 and which is informed by our analysis of the CSO POWSCAR data of 2011, the latest year for which full factual information on the level of employment within Meath is available (the baseline situation);
- Inputs to the projected level of employment in Meath in 2022, incorporating;
 - National economic projections, including employment growth projections
 - Assessment of sectoral and sub-sectoral prospects and opportunities
 - Spatial assessment, where we consider identified sites for potential employment purposes around the county whilst mindful of the economic/settlement hierarchy in the Meath CDP (as varied)
- Projected levels of employment in 2022 for each of the three economic scenarios (central, optimistic and pessimistic); and
- Further validation of the projected employment levels, where we make 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 our projections.

Figure 8.1: Summary of the Methodology used to Formulate the Economic Vision for Meath 2022

Source: Consultancy team.

The chart above shows how the four steps determine the employment projections in 2022, where the purpose of the modelling is to project the baseline situation in 2011 ten years hence, whilst taking into account what can be credibly achieved in the county given skills availability, sectoral prospects and trends, and available or deliverable sites and workspaces for enterprise and employment development. The uni-directional arrows in the chart above convey that the first two steps are key ingredients in determining the employment projections and the two-way arrows reflect the fact that steps 3 and 4 of the process and the employment projections themselves are jointly determined in the modelling.

The box at the bottom of Figure 8.1 is important in understanding the meaning and composition of the employment projections. For each of the three scenarios – central, optimistic and pessimistic – there are two factors giving rise to the employment projections: firstly the rate of growth of employment; and secondly whether there will be sectoral change or not. In particular, there are three rates of employment growth associated with the three scenarios – in the pessimistic scenario, employment growth will be ‘low’ and will be ‘medium’ and ‘high’ in the central and optimistic scenarios respectively. The low, medium and high employment growth rates are informed by the national projections and sectoral opportunities, primarily.

Turning to sectoral change, the pessimistic scenario assumes that there will be no sectoral change to the composition of employment in Meath in 2022 (i.e. it will be the same as in 2011, only with a little more employment as determined by the low employment growth rate). On the other hand, the central and optimistic scenarios allow for sectoral change – the difference between them is that there will be a greater quantum of additional employment in the optimistic scenario.

The sectoral change aspect of the employment projections is important because it admits the opportunity for Meath to broaden its employment base as well as creating more jobs between now and 2022. The most important sectoral change will occur in ICT and professional services (internationally-traded services), which we believe can be achieved. There will also inevitably be a shift in the share of employment attributed to construction but we believe this should be as small as possible in order to avoid the situation that occurred prior to the onset of the economic crisis from 2008, when the property bubble and construction work were absorbing an unsustainable proportion of the labour force. When the crash erupted, and demand for construction workers collapsed in a very short period of time, the workers, many of who chose to forego third-level education owing to the growth of the construction sector in the years before the crisis, had little or no scope to adjust and vast numbers of young people previously engaged in this sector had no choice but to leave for faraway destinations like Australia and Canada (many who stayed at home ended up as long-term unemployed and the correlation between youth and long-term unemployed has been high in Ireland, which in turn points to the importance of educational attainment in giving school-leavers and workers options in their careers).

8.4 Analysis of the Economic Vision and its Spatial Expression

Baseline Employment

The local labour market in Meath can be seen to comprise three strands of worker as follows:

- Those working and living in Meath;
- Those working in Meath but living elsewhere (the inbound commuters); and
- Those living in Meath but working outside of the county (the outbound commuters).

In turn, using the three strands of the labour market, we can think of two total levels of employment for the county – based on a narrow and a wide geographic labour market. In particular, the *total level of employment within Meath* is defined as the sum of (1) those working and living in Meath and (2) those working in Meath but living elsewhere; and the *wider level of employment relating to Meath* is given as the sum of the total employment within Meath and the outbound commuters (or the addition of all three strands of the labour market). This latter delineation of the local labour market is of interest because the quantum of outbound commuting from Meath is so high, and therefore one should look at the immediate Meath labour pool, for inward investment purposes, for example, as comprising of the two types of commuter as well as those who both live and work in the county.

Viewed in this way, and mindful of Meath's favourable geographic position next to the most densely populated part of the country, the potential recruitment pool for a prospective inward investor considering Meath is in fact much larger than suggested by the data presented below: the M50 and its links to Dublin and Meath mean that skills for particular labour needs can be sourced throughout the Mid-East and Dublin Regions – and indeed this characteristic has been described as one of the salient advantages of locating in Meath from our conversations with senior personnel in FDI companies currently based in Meath.

Thus, central to Meath's economic promotion should be its location in the heart of the GDA, where the potential labour pool is in the region of 1 million.

With these principles in mind, we can proceed to quantify the three strands making up the labour market in Meath to arrive at the baseline situation in 2011, using the CSO POWSCAR data in that year, when the last census was conducted. In the following four tables, we present data on key features of the local labour market in Meath as well as showing the numbers of jobs for the three strands of the labour market.

The first of these tables (Table 8.2) shows that there were 38,822 persons employed in Meath in 2011, this being the sum of the number of persons working and living in Meath (28,449) and the number of inbound commuters to the county or those working in Meath but living elsewhere (10,373). However, the biggest of the three strands to the labour market in Meath is made up of the outbound commuters or those living in Meath and working elsewhere – there were 32,942 persons in this category in 2011, representing 54% of all residents in the county at work in any location in that year. The wider Meath labour market incorporates the outbound commuters giving overall employment of almost 72,000 persons at the last census. The potential labour pool for inward investment enterprises thinking of locating in Meath is much bigger again (c. 1 million), reflecting Meath's favourable location in the heart of the National Gateway and its connectivity to the GDA through its strong transport links, including the M50 and the motorways to which it is linked radiating from the capital.

Table 8.2: Baseline Employment in Meath (2011) – Persons Employed, Age Profile and Educational Attainment

Statistic/Variable	Persons Employed (2011)				
	Working & Living in Meath	Working in Meath and Living Elsewhere - Inbound Commuters	Living in Meath and Working Elsewhere - Outbound Commuters	Total Employment within Meath	Wider Meath Total Employment
Persons	28,449	10,373	32,942	38,822	71,764
Age Profile					
20-44 Years	16,849	7,217	23,375	24,066	47,441
	59.2%	69.6%	71.0%	62.0%	66.1%
State	62.6%	62.6%	62.6%	62.6%	62.6%
Third-Level/Higher Educational Attainment	7,081	3,875	13,598	10,956	24,554
	24.9%	37.4%	41.3%	28.2%	34.2%
State	38.0%	38.0%	38.0%	38.0%	38.0%

Source: CSO POWSCAR (2011), Maynooth University economic baseline study of Meath (2013) and consultancy team analysis.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Meath is greater than that for the State.

Also shown in Table 8.2 above are the age profiles of those at work in the labour market categories and the numbers of workers with third-level educational attainment. Comparisons are drawn with the State (country as a whole) and the boxed cells show where the proportion for Meath exceeds that of the State – interpreted as a comparative strength for Meath. Quite clearly, Meath's demographic labour market advantages are encountered among the inbound and outbound commuters, where the proportion of those at work aged between 20 and 44 years is higher in Meath compared with the country as a whole.

However, in terms of higher educational attainment, only among the outbound commuters do we find that the proportion with third-level qualifications in Meath exceeds that in the State (41.3% versus 38%).

The next table provides corresponding analysis of the baseline employment situation focused on socio-economic groups – the boxed cells indicating Meath's comparative strengths compared with the State.

Looking at the socio-economic groups (a) employers and managers, (b) higher professionals and (c) lower professionals, Meath's relative advantages occur primarily among its outbound commuters. However, there is also *substantial leakage*. In 2011, the number of employers and managers living in the county but leaving for work (7,438) exceeded the number of employers and managers working within Meath (6,115); the same pattern was evident among the higher professionals (2,859 were outbound commuters compared with 2,089 working within the county) and the lower professionals (6,086 outbound commuters as against 5,759 working within the county). Proceeding to the other socio-economic groups – non-manual, manual skilled and semi-skilled – the proportions working and living in Meath are higher than the corresponding proportions in the country as a whole and the comparative advantage attributed to the outbound commuters ceases when we move into the semi-skilled group.

Table 8.3: Baseline Employment in Meath (2011) – Persons Employed and Socio-Economic Groups

Statistic/Variable	Persons Employed (2011)				
	Working & Living in Meath	Working in Meath and Living Elsewhere - Inbound Commuters	Living in Meath and Working Elsewhere - Outbound Commuters	Total Employment within Meath	Wider Meath Total Employment
Persons	28,449	10,373	32,942	38,822	71,764
Socio-Economic Groups					
Employers & Managers	4,230	1,885	7,438	6,115	13,553
	14.9%	18.2%	22.6%	15.8%	18.9%
State	15.8%	15.8%	15.8%	15.8%	15.8%
Higher Professionals	1,289	800	2,859	2,089	4,948
	4.5%	7.7%	8.7%	5.4%	6.9%
State	8.0%	8.0%	8.0%	8.0%	8.0%
Lower Professionals	3,856	1,903	6,086	5,759	11,845
	13.6%	18.3%	18.5%	14.8%	16.5%
State	15.5%	15.5%	15.5%	15.5%	15.5%
Non-Manual	8,324	2,459	9,620	10,783	20,403
	29.3%	23.7%	29.2%	27.8%	28.4%
State	25.9%	25.9%	25.9%	25.9%	25.9%
Manual Skilled	2,415	1,256	2,886	3,671	6,557
	8.5%	12.1%	8.8%	9.5%	9.1%
State	7.7%	7.7%	7.7%	7.7%	7.7%
Semi-Skilled	3,066	1,205	2,569	4,271	6,840
	10.8%	11.6%	7.8%	11.0%	9.5%
State	9.4%	9.4%	9.4%	9.4%	9.4%

Source and note: See Table 8.2.

Table 8.4 overleaf presents the same analysis as contained in the previous two tables but now for the sectors covered by the CSO in the POWSCAR 2011. While a lot of information is conveyed in the table, careful examination of the evidence reveals a number of noteworthy features of Meath's labour market.

First, not unexpectedly, the primary sector agricultural, forestry and fishing is dominated by those working and living in Meath and the proportion of people at work in this sector (9.4%) is over twice the corresponding proportion for the country as a whole (4.5%), illustrating Meath's comparative strength in this sector.

Secondly, the proportion of persons in employment in the sector manufacturing, mining and quarrying, electricity, gas, water supply and waste management is greater in Meath than the State and this fact reflects the comparative strength of indigenous industry in the county, where Meath is home to a number of successful Irish-owned enterprises active in engineering, manufacturing and mining.

Third, the proportion of people engaged in the construction sector was lower in Meath than the country as a whole in 2011 and this may reflect the fact that a lot of residential and civil engineering (including road-building) work was completed in the county in the years previous to the last census year. In addition, the low employment densities in construction in Meath and the State (4.4% and 5.9% respectively in 2011) contrast sharply with the densities that prevailed before the property/construction crash in 2008 (when over 10% of those at work in the country were employed in construction). Economists would generally caution against such a share occurring again because it is unsustainable and risks displacing employment in other sectors. As the economic recovery continues to gather momentum in 2014/2015, it is inevitable that the share of employment associated with construction will rise; however, economic policy needs to guard against a situation in which the sector grows unsustainably to the detriment of other, more sustainable and less volatile sectors.

Fourthly, there are strengths across the three strands of employment in the wholesale, retail, transportation and storage, accommodation and food service activities sector, where the proportions for Meath exceed those for the State. This reflects the overall strength of wholesaling and retailing in the county, and the development of tourism in Meath in recent years (however, we are also mindful of leakage in respect of comparison shopping from Meath to other local authority areas).

Fifth and in our view most importantly in the context of this report is the sector information and communication, financial, real estate, professional, administrative and support service activities. This sector includes internationally-traded services, within which are ICT, financial and business services. The stark message of the analysis shown in Table 8.4 is that the proportion of persons employed in this key sector is significantly lower in Meath compared with the country as a whole (12.1% compared with 18.5% in 2011); however, the proportion of outbound commuters working in the sector is appreciably higher than that for the State (23.6% versus 18.5%) and there are far more outbound commuters working in this sector compared with those at work in Meath (7,771 versus 4,683). From our consultations with stakeholders during the study, those working in this sector *within* the county are predominantly active in locally/domestically-traded services; whereas the outbound commuters engaged in the sector are primarily active in internationally-traded services and located mainly in Dublin.

A big challenge, or rather opportunity, for Meath is to move the proportion of people employed in this sector within Meath to a level greater than the 12.1% observed in 2011. Harnessing the outbound commuters to attract more FDI and growing indigenous enterprises active in the sector will be important to achieving this opportunity. The even larger labour pool in the GDA on the doorstep of Meath should also be harnessed to support more employment in this key knowledge-based sector in the county.

Table 8.4: Baseline Employment in Meath (2011) – Persons Employed and Sector

Statistic/Variable	Persons Employed (2011)				
	Working & Living in Meath	Working in Meath and Living Elsewhere - Inbound Commuters	Living in Meath and Working Elsewhere - Outbound Commuters	Total Employment within Meath	Wider Meath Total Employment
Persons	28,449	10,373	32,942	38,822	71,764
Sectors					
Agricultural, forestry & fishing	2,670	192	225	2,862	3,087
	9.4%	1.9%	0.7%	7.4%	4.3%
State	4.5%	4.5%	4.5%	4.5%	4.5%
Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	1,753	4,186	5,514	9,700
	13.2%	16.9%	12.7%	14.2%	13.5%
State	12.9%	12.9%	12.9%	12.9%	12.9%
Construction	1,165	554	992	1,719	2,711
	4.1%	5.3%	3.0%	4.4%	3.8%
State	5.9%	5.9%	5.9%	5.9%	5.9%
Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	2,824	8,891	11,180	20,071
	29.4%	27.2%	27.0%	28.8%	28.0%
State	26.8%	26.8%	26.8%	26.8%	26.8%
Information and communication, financial, real estate, professional, administration and support service activities	3,262	1,421	7,771	4,683	12,454
	11.5%	13.7%	23.6%	12.1%	17.4%
State	18.5%	18.5%	18.5%	18.5%	18.5%
Public administration and defence; compulsory social security	1,540	855	2,972	2,395	5,367
	5.4%	8.2%	9.0%	6.2%	7.5%
State	5.4%	5.4%	5.4%	5.4%	5.4%
Education, human Health and social work activities	5,798	2,351	6,636	8,149	14,785
	20.4%	22.7%	20.1%	21.0%	20.6%
State	20.6%	20.6%	20.6%	20.6%	20.6%
Other service activities	1,411	340	1,116	1,751	2,867
	5.0%	3.3%	3.4%	4.5%	4.0%
State	5.2%	5.2%	5.2%	5.2%	5.2%

Source and note: See Table 8.2.

Finally, in relation to Table 8.4 above, the non-market services sectors – namely (i) public administration and defence, compulsory social security and (ii) education, human health and social work activities – attract an appreciably large number of inbound commuters to work in Meath, which is reflected in the fact that the proportion of employment in each of these sectors among the inbound commuters exceeds that for the State. It is also seen that there is a sizeable leakage of talent out of the county in these sectors (principally to Dublin) – there were 2,972 persons working in the first of these sectors classified as outbound commuters in 2011 (more than the total number of such people at work in the sector in Meath in that year, namely 2,395) and there were 6,636 outbound commuters working in the second sector. These sectors consist of public service activities and, while the people working within them, within or outside of Meath, have important skills and work experiences, it seems to us unlikely that they would take the risk of moving out of their sectors and/or back to their county of residence without similar such employment, and benefits, becoming available in Meath. Such employment opportunities in Meath and countrywide are likely to remain muted between now and the end of the decade, owing to the need to maintain discipline in respect of the public finances (through Ireland’s commitment to the EU Fiscal Compact and the fact that Troika will maintain surveillance over the Irish economy).

Lastly on baseline employment, Table 8.5 below makes use of data obtained by the consultancy team from Forfás (now part of the DJEI) on agency-assisted indigenous and foreign-owned enterprises to derive the corresponding proportions of people employed in these firms in Meath and to compare the figures with those for the country as a whole.

Table 8.5: Baseline Employment in Meath (2011) – Persons Employed and Agency-Assisted Firms

Statistic/Variable	Total Employment within Meath (2011)
Persons	38,822
Agency-Assisted Enterprises	
Indigenous/Irish-Owned	4,654
State	12.0%
	8.0%
Foreign-Owned	1,140
State	2.9%
	7.9%
All-Agency Assisted	5,794
State	14.9%
	15.8%

Source and note: See Table 8.2.

The analysis presented in the table above highlights Meath’s comparative strength in agency-assisted indigenous employment but at the same time the county’s relative deficit in regard to FDI or foreign-owned employment.

In particular, in 2011, there were 4,654 persons employed in agency-assisted Irish-owned enterprises in Meath (Enterprise Ireland client companies), representing 12% of all persons employed in Meath in that year (38,822). This proportion was 4 percentage points higher than the corresponding proportion for the State, also shown in Table 8.5.¹⁶⁶

On the other hand, the 1,140 persons employed in agency-assisted foreign-owned companies in Meath in 2011 (IDA Ireland client enterprises) represented less than 3% of all persons employed in Meath in that year. This proportion was less than half that for the State as a whole, as also shown in Table 8.5.

Summing up on the baseline employment situation in Meath, among the salient features of the local labour market in the county are the following:

- *The undoubted significance of the outbound commuters* – (1) who have educational attainment above those working and living in Meath and the inbound commuters coming into work in the county, and those at work across the country, (2) who are strongly represented among the higher socio-economic groups (employers and managers, and higher professionals) and (3) who are also strongly represented in the important market services sector comprising ICT, financial, professional and business services;
- *The strength and growth of indigenous employment* – where the evidence indicates a relatively strong position in respect of employment among agency-assisted Irish-owned enterprises located in Meath; and
- *The FDI deficit* – the density of agency-assisted foreign-owned employment is (in our view) unacceptably low in Meath compared with the country as a whole (notwithstanding the fact that Meath is home to a number of successful and highly welcome FDI companies currently).

To help achieve the Economic Vision for Meath by 2022, it will be important for the Economic Development Strategy to build on what Meath is already good at and doing well, and at the same time to harness the opportunity presented by the quantum and qualities of the outbound commuters to address the FDI deficit in the county and ensure a greater number and share of inward investment. In regard to the latter, and as shown in further data analysis presented below, the most likely or feasible opportunities for Meath in regard to FDI in the coming years will be in ICT (software/digital media), international financial services (funds administration), international business services (business processing, customer support centres) and med-tech/life sciences/biotechnology; and we would also highlight international business services as an activity in which Irish-owned employment has grown strongly in recent years (also shown in the further data analysis presented below).

¹⁶⁶ Since 2011, the Forfás data specially obtained by the consultancy team indicate that there has been strong growth in the number of persons employed in agency-assisted indigenous enterprises in Meath – from the 4,654 in 2011 to 4,894 the following year and to 5,306 in 2013, implying an impressive cumulative growth rate of 14% during 2011-2013. The positive trend in employment among agency-assisted Irish firms in Meath since 2010 (Figure 7.17, p. 154) contrasts markedly with that among agency-assisted foreign-owned firms in the county, where there has been a marked downward trend since 2004 (Figure 7.18, p. 155).

Inputs to the Projected Level of Employment in 2022

Input 1: National Economic Projections

The first input to projecting the baseline employment situation in Meath to 2022 is national economic projections.

Table 8.6 overleaf comes in two parts: the shaded part at the bottom of the table shows the employment growth rates used in projecting the baseline level of employment in Meath in 2011 to the year 2022 for each of the three scenarios – central, optimistic and pessimistic; the figures preceding the shaded part of the table are from current national projections regarding the Irish economy and are used to inform the employment growth rates specified for Meath shaded in the bottom part of the table.

Four sets of national projections underpin the employment projections for Meath: the IMF's latest World Economic Outlook (WEO) projections, which were published in April 2014 and pertain to the period 2013-2019 (for completeness and good order, we also show the IMF's (actual) figures for 2011 and 2012 – because the baseline year for Meath is 2011 and we need to project from that year; the Irish government's MTES projections, which commence with estimates for 2013 and conclude in 2020; the Department of Finance's projections in the context of the Stability Programme Update or SPU, which were released in April 2014 and cover the period 2014-2020;¹⁶⁷ and the ESRI's Medium Term Review (MTR), the latest release of which took place in July 2013 and which relates to 2013-2020.¹⁶⁸

Of particular interest to our analysis of the Economic Vision for Meath 2022 are the employment growth projections. More specifically, the central scenario incorporates the following projections for the sub-periods indicated (i.e. we synthesise the existing projections, using an element of judgement):

- 2012-2013 – the IMF's (actual) employment growth figures of -0.6% and 2.3% respectively are applied to the Meath baseline in 2011 to generate the projections for 2012 and 2013 respectively;
- 2014-2018 – the Department of Finance's SPU employment growth figures of 2.2%, 2%, 2%, 1.9% and 1.9% in 2014, 2015, 2016, 2017 and 2018 respectively are applied to the Meath situation in turn;
- 2019-2020 – the MTES employment growth figures are used to determine the rates of 2% and 1.8% in 2019 and 2020 respectively and applied to give the Meath figures in those years; and
- 2021-2022 – the assumption is used whereby employment growth in Meath is maintained at 1.8% per annum in each of these years.

For the optimistic and pessimistic growth scenarios around the central scenario, we also make use of the ESRI's 'recovery' and 'stagnation' scenarios in its (latest available) MTR (July 2013). The optimistic scenario is the same as the central scenario for 2012-2013, then takes the growth rate values of 2.3%, 2.3%, 2.5%, 2.3%, 2.2%, 2.1% and 2.1% in 2014, 2015, 2016, 2017, 2018, 2019 and 2020 respectively before assuming the employment growth rate of 2.1% in each of 2021 and 2022. The pessimistic scenario takes the MTR stagnation employment growth rates for 2013-2020 and then assumes that the growth rates in 2021 and 2022 will be the same as that projected in 2020, namely 0.4%.

¹⁶⁷ Under the planned tighter economic policy coordination now in place in the EU, aimed at helping to minimise the risk of future fiscal crises occurring, each Member State is required to submit an SPU to the European Commission in April of each year. Ireland's SPU was submitted and published in April 2014, and reflects the inputs of the Irish Fiscal Advisory Council (IFAC).

¹⁶⁸ Ordinarily, the latest ESRI MTR would have been published this year. The consultancy team understands that the future of the MTR is uncertain due to staff retiring/changes at the ESRI, *inter alia*.

Table 8.6: Summary of Economic Projections for the Irish Economy and Employment Growth Rates Used to Inform the Three Scenarios relating to the Economic Vision for Meath 2022 – Central, Optimistic and Pessimistic Scenarios

Projection (Period)	Date	Variable	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
IMF (2013-2019)	2014 (April)	Real GDP Growth	2.2%	0.2%	-0.3%	1.7%	2.5%	2.5%	2.5%	2.5%	2.5%			
		Unemployment Rate (%)	14.6%	14.7%	13.0%	11.2%	10.5%	10.1%	9.6%	9.3%	8.9%			
		Employment Growth (%)		-0.6%	2.3%	2.2%	1.8%							
		General Government Deficit (% GDP)	13.1%	8.2%	7.4%	5.1%	3.0%	2.4%	1.7%	1.2%	0.7%			
		General Government Gross Debt (% GDP)	104.1%	117.4%	122.8%	123.7%	122.7%	119.6%	116.8%	113.1%	109.1%			
MTES (2013-2020)	2013 (Dec)	Real GDP Growth			0.2%	2.0%	2.3%	2.8%	3.5%	3.5%	3.5%	3.5%		
		Unemployment Rate (%)			13.5%	12.4%	11.8%	11.4%	10.6%	9.6%	8.7%	8.1%		
		Employment Growth (%)			1.6%	1.5%	1.3%	1.3%	2.0%	2.1%	2.2%	1.8%		
		General Government Deficit (% GDP)			7.3%	4.8%	3.0%	2.4%	1.0%	0.5%	0.4%	0.0%		
		General Government Gross Debt (% GDP)			124.0%	120.0%	118.0%	115.0%	110.0%	104.0%	98.0%	93.0%		
Dept of Finance (2014-2018) Stability Programme Update (SPU)	2014 (April)	Real GDP Growth				2.1%	2.7%	3.0%	3.5%	3.5%				
		Unemployment Rate (%)				11.5%	10.5%	9.7%	8.9%	8.0%				
		Employment Growth (%)				2.2%	2.0%	2.0%	1.9%	1.9%				
		General Government Deficit (% GDP)				4.8%	2.9%	2.2%	1.2%	0.0%				
		General Government Gross Debt (% GDP)				121.4%	120.0%	115.9%	112.0%	107.2%				
ESRI (MTR) (2013-2020)	2013 (July)	Employment Growth (%) - 'Recovery'		-0.6%	0.5%	0.9%	2.3%	2.9%	1.9%	2.2%	2.1%	2.1%		
		Employment Rate (%) - 'Stagnation'		-0.6%	0.4%	1.2%	0.8%	-0.3%	0.9%	0.2%	0.0%	0.4%		
Meath Economic Vision (2012-2022)	2014 (Aug)	Employment Growth - 'Central'	Baseline	-0.6%	2.3%	2.2%	2.0%	2.0%	1.9%	1.9%	2.0%	1.8%	1.8%	1.8%
		Employment Growth - 'Optimistic'	(POWSCAR	-0.6%	2.3%	2.3%	2.3%	2.5%	2.3%	2.2%	2.2%	2.1%	2.1%	2.1%
		Employment Growth - 'Pessimistic'	2011)	-0.6%	0.4%	1.2%	0.8%	-0.3%	0.9%	0.2%	0.0%	0.4%	0.4%	0.4%

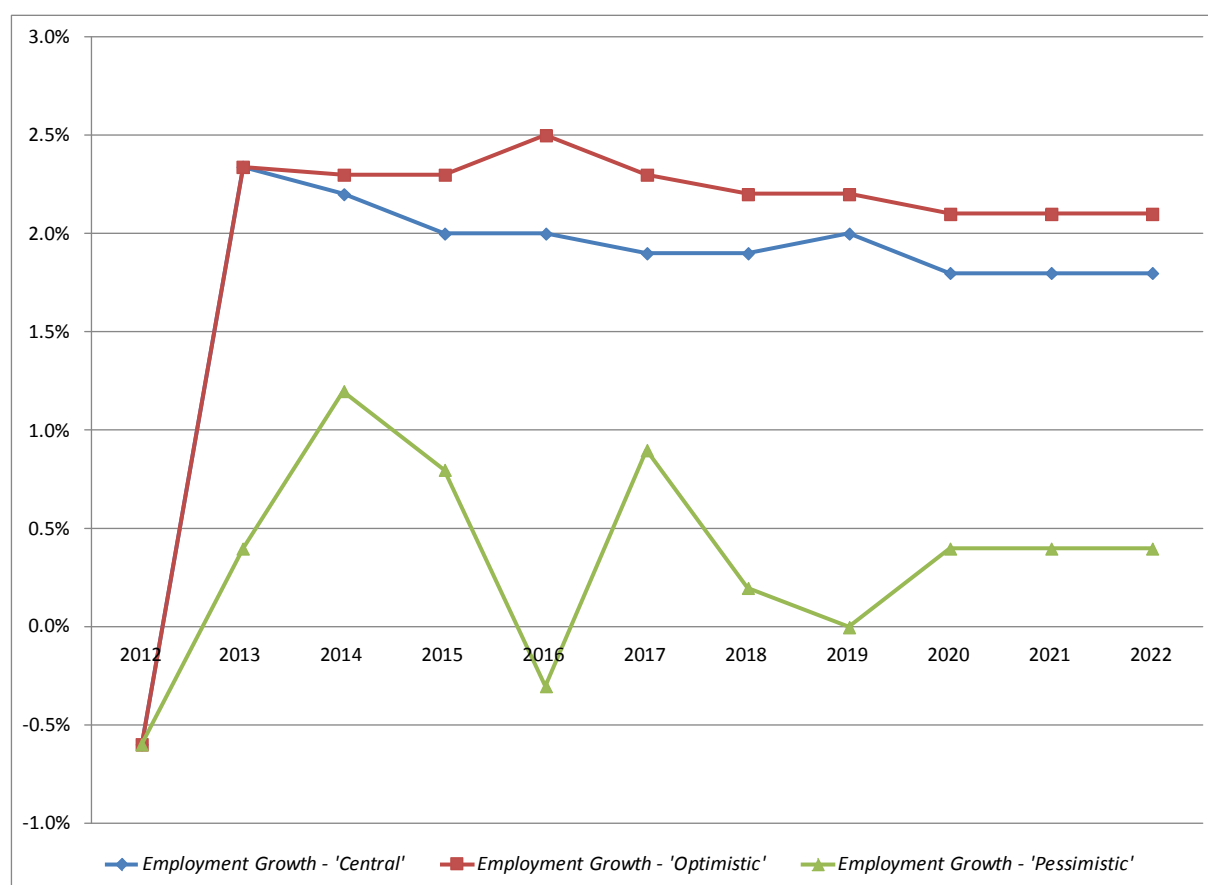
Source: IMF World Economic Outlook (WEO) April 2014; Irish government MTES December 2013; Department of Finance SPU April 2014 (the SPU forecasts are also shown in the Department of Finance's Monthly Economic Bulletins, the latest release being August 2014 at the time of preparing the analysis for this report); ESRI MTR July 2013; consultancy team review and synthesis.

Note: The IMF actual values for 2011 and 2012 are shown in the table because the baseline number of jobs in Meath pertains to the year 2011.

While the projections used in the formulation of the Economic Vision for Meath may be debated, we are conscious of the need to reference independent and official projections for the Irish economy.¹⁶⁹

Graphical illustration of the employment growth projections in the three scenarios is provided in Figure 8.2 below. Beginning with negative growth in 2012 (-0.6% actual rate), employment growth picks up rapidly in the central scenario (reflecting the strong actual jobs growth in 2013) and then moderates in 2014 and 2015 before eventually settling at a rate of 1.8% in the last two years. The local peak in the rate of employment growth in the central scenario in 2019 reflects in part the (projected/assumed) implementation of the fiscal reforms at this time. In the optimistic scenario, the higher employment growth rates in 2015 and 2016 are based on a 'bullish' outlook in respect of European recovery, which will depend in part on resolve regarding fiscal discipline and competitiveness gains. In the (ESRI's) pessimistic scenario, employment growth is much more volatile as well as subdued.

Figure 8.2: Illustration of Employment Growth Projections for the Irish Economy (Used in the Formulation of the Economic Vision for Meath 2022)



Source: IMF World Economic Outlook (WEO) April 2014; Irish government MTES Dec 2013; Department of Finance SPU April 2014; and ESRI MTR July 2013; consultancy team review and synthesis.

¹⁶⁹ Other recent projections concerning the Irish economy include the IBEC (Irish Business and Employers Confederation) Economic Outlook (August 2014) but this is not an official projection. See also the remarks made in the Preface to this report regarding the most recent (bullish) projections for the Irish economy.

To sum up the employment growth projections used here, and bearing in mind that the baseline employment situation in Meath is for the year 2011, the following annual average growth rates are implied by the scenarios, which we consider are reasonable for the purpose of deriving the Economic Vision for Meath:

- Central scenario – 1.7% 2012-2022 and 1.9% 2014-2022;
- Optimistic scenario – 2% 2012-2022 and 2.2% 2014-2022;
- Pessimistic scenario – 0.3% 2012-2022 and 0.4% 2014-2022.

To put the employment growth projections in further context, regard may be had to periods in the recent past and the longer-term trend since 1980. Employment growth nationally averaged 4.7% per year during 1993-2001, which today is looked back upon as being an exceptional period of largely sustainable, export-led growth in the Irish economy and unlikely to be repeated in the foreseeable future (partly because much of that growth was 'catch-up' growth that brought Ireland into line with other advanced economies). Employment growth nationally was also strong at 3.4% per year during 2002-2007, but this was a period of unsustainable, property bubble-fuelled growth that would be better not repeated in the future. Longer-term, during 1980-2012, employment growth in Ireland averaged 1.5% per annum. Thus, our central and optimistic employment growth rates for Meath are pitched between the more recent episodes of rapid growth (good and bad) and the longer-term trend for the country (closer to the latter), which we consider is sensible for the task at hand.

In terms of the probabilities of occurrence, and the derivation of an additional proposed *expected value of the level of employment in Meath in 2022*, incorporating all three scenarios simultaneously, we consider that the following likelihoods are reasonable to employ:

- Central scenario – 50% probability of occurrence;
- Optimistic scenario – 35% probability; and
- Pessimistic scenario – 15% chance of happening.

While there are factors outside the control of Meath County Council and its local partners, including geo-political risks internationally, and the overall performance of the Irish economy, there are at the same time a number of initiatives that can be taken by the Council and its partners to ensure progression towards the Economic Vision and these are set out in the proposed Actions in the next section of the report.¹⁷⁰

¹⁷⁰ In regard to the tensions in Ukraine, on 6 August 2014, President Vladimir Putin announced a decree banning or curbing agricultural imports for a period of one year from sanctioning countries in the west (the US and the EU). According to the CSO, agricultural imports from Ireland to Russia were worth €235m in 2013, and it is expected that affected exports from Ireland to Russia will include fruit and vegetables, meat and dairy (cheese). In addition, renewed tensions have re-occurred in Iraq (with US military intervention being applied in early August) and the Ebola crisis in western Africa has the potential to contribute further adverse economic impact on advanced economies like Ireland.

Input 2: Assessment of Sectoral and Sub-Sectoral Prospects

Framework for Assessing Sectoral and Sub-Sectoral Opportunities

Introducing the Framework

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

- Agricultural, forestry and fishing;
- Manufacturing, mining and quarrying, electricity, gas, water supply and waste management;
- Wholesale, retail trade, transportation and storage, accommodation and food service activities;
- Public administration and defence; compulsory social security; and
- Education, human Health and social work activities.¹⁷¹

More specifically, it is well known that Meath is strong in *primary agriculture*. In the second sector, we know that the county is 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 in *accommodation and hospitality*, reflecting the opportunity presented by tourism. The third and fourth sectors comprise predominantly non-market activities where public service employment is the order of the day. Owing to the need to address the public finances – specifically to meet the 3% target agreed with the Troika in respect of the general government deficit as a proportion of GDP by the end of 2015 and to subsequently reduce the proportion even further by 2020 in line with the EU Fiscal Compact – employment in the public sector is likely to remain constrained during the medium-term (nationally as well as in Meath).

In addition, our analysis of the baseline situation also shows that Meath is home to a number of strong agency-assisted Irish-owned businesses and that there has been appreciably large growth in employment among these companies during 2011-2013.¹⁷²

However, it is also observed that Meath has underperformed in attracting FDI, despite being the location of choice for a number of successful foreign-owned companies active in key, high value sectors. The county's underperformance in FDI is partly manifest in the fact that, in 2011, only 12% of all jobs within Meath were in value added services (including internationally-traded services, ICT etc.) compared with 18.5% countrywide, 19.3% in the Mid-East Region and almost 29% in Dublin. Along with certain manufacturing activities, like med-tech/life sciences/biotechnology and pharma-chem, internationally-traded services is one of the areas in which Ireland has an international comparative advantage (reflected in export performance) and this is largely due to FDI and a small proportion of impressively-performing indigenous enterprises (although primarily FDI). While Meath has a solid base on which to grow and diversify its manufacturing activities, a major challenge/opportunity for the county is to grow its presence of internationally-traded services firms and this must be closely linked to enhancing FDI performance as part of the Economic Development Strategy for Meath during 2014-2020.

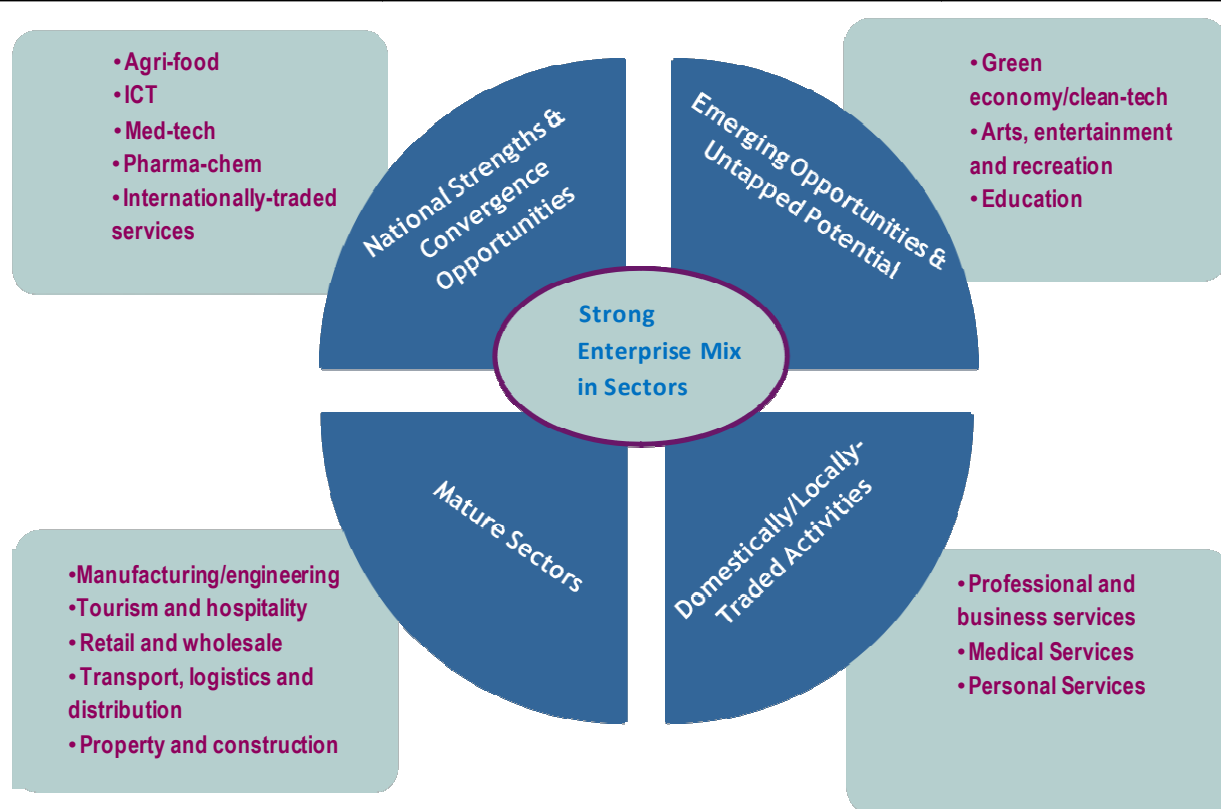
¹⁷¹ The relative strengths can be seen from the boxed cells under the column 'Total Employment within Meath' in the table showing the sectoral allocation of employment in the county, namely Table 8.4 (p. 205).

¹⁷² *Supra* footnote 166.

While it is fashionable, yet relevant, in the current climate to highlight employment opportunities in high-tech manufacturing and internationally-traded services, it is also important not to forget the many other sectors for which there will be employment opportunities during the medium-term (2014-2022).

With this in mind, our analysis of sub-sectoral and cluster opportunities for Meath is based on a comprehensive framework that includes the range of economic sectors grouped into four categories, as shown in Figure 8.3 below. The framework reflects previous work on enterprise development by Forfás and the now DJEI as well as our own thinking, review and analysis, and represents a rounded and relevant approach for thinking about the specific employment opportunities for Meath over the coming years.¹⁷³

Figure 8.3: Framework for Sectoral and Sub-Sectoral Employment Opportunities in Meath



Source: Department of Jobs, Enterprise and Innovation, and Forfás; consultancy team review.

¹⁷³ As remarked earlier (footnote 40, p. 34), from August 2014, Forfás will be dissolved and will form the core of the Strategic Policy Division within the DJEI.

General Description of the Sub-Sectoral Framework

An overarching observation which should be borne in mind in the following outline of the sectoral framework is that none of the four categories of sectors should take outright precedence in the implementation of the Economic Development Strategy for Meath. As will become clear, there are important employment opportunities for the county in all four categories and the challenge/opportunity will be to facilitate a change in the composition of activities from the baseline towards more sustainable and higher value activities that can be achieved in practice given Meath's people resources and other comparative economic strengths. As alluded to earlier, an important opportunity will be to boost the share of employment within Meath attributable to the first category of sectors – in line with the focus of enterprise policy nationally and given the low employment share currently attained by the first category sectors in Meath – while at the same growing the level of employment in the other categories of sectors. *Specific shifts in the composition of employment in Meath need to occur in ICT (software), med-tech/biotechnology and internationally-traded services (international financial services and international business services, which include customer services centres), where there will be opportunities for Irish-owned enterprises as well as FDI. However, it is unlikely that pharma-chem can be boosted by much in Meath during the medium-term, owing to particular challenges within the sector and the fact that other locations in Ireland are strong here.*

National Strengths and Convergence Opportunities Category

Agri-food
ICT
Life sciences/medical technologies (med-tech)
Pharmaceuticals-chemicals (Pharma-chem)
Internationally-traded services – financial services and business services

Taken altogether, it is estimated by the consultancy team on the basis of analysis of data from the CSO's Quarterly National Household Survey (QNHS) and Forfás' Annual Employment Survey (AES) and Annual Business Survey of Economic Impact (ABSEI) that total employment in this category of sectors *nationally* is approximately 350,000 or almost one-in-five of all persons at work in the country. Importantly, at national level, this category of sectors has been growing in terms of the number of jobs in recent years (since 2010) and its estimated share of all employment has increased from around 17% in 2007 to nearly 20% currently (while seemingly small in percentage point terms, this represents a major change in the composition of employment in Ireland, towards high value added sectors and ones in which the country has a comparative advantage internationally). Table 8.7 below illustrates the recent employment growth in this category of sectors nationally among all firms (indigenous and Irish-owned) and the category's increasing share of overall employment since 2007.¹⁷⁴

¹⁷⁴ More details on the sub-sectors within this category of sectors are provided in the Annex at the end of the report (Table A6, p. 279). The notes to each of the corresponding tables for the other three categories of sectors making up the framework (Table 8.9, Table 8.10 and Table 8.11) include links to the corresponding more detailed tables of employment data in the Annex (Table A7, Table A8 and Table A9 respectively).

Table 8.7: Employment in the Category of National Strengths and Convergence Opportunities Sectors in Ireland (2007-2012)

Category and Sector	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR (2007- 2012)	CAGR (2010- 2012)	CAGR (2011- 2012)
	2007	2008	2009	2010	2011	2012			
Strengths and Convergence Opportunities									
Agri-food	168,987	169,475	143,372	134,910	132,712	134,755	-4.4%	-0.1%	1.5%
ICT	97,060	103,368	102,267	102,005	101,469	103,414	1.3%	0.7%	1.9%
Medical technologies	23,835	23,264	23,457	23,148	24,405	25,475	1.3%	4.9%	4.4%
Pharma-chem	36,060	33,376	33,641	36,652	32,674	34,020	-1.2%	-3.7%	4.1%
Internationally-traded services	40,712	43,196	40,717	41,047	45,100	46,604	2.7%	6.6%	3.3%
Sub-Total	366,654	372,679	343,454	337,761	336,360	344,268	-1.3%	1.0%	2.4%
Category % of Total Employment	17%	17%	18%	18%	18%	19%	2.0%	2.2%	2.6%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes used in compiling the sectors are as follows: agri-food (1-3, 10-12); ICT (26, 58-63); medical technologies (Forfás AES/ABSEI); pharma-chem (19-21); internationally-traded services (Forfás AES/ABSEI). Further details on the sub-sectors within this category of sectors are provided in the Annex (Table A6, p. 282).

Table 8.8 overleaf provides analysis of employment and exports performance among both Irish and foreign-owned *agency-assisted* companies in the five sectors in 2007 and 2012, from the latest ABSEI (2012).¹⁷⁵ Taken together, Irish and foreign-owned agency-assisted companies in the five sectors in the first category accounted for almost 190,000 employees in 2012. While the absolute number of employees was down slightly on the pre-crisis figure (2007), the share of all national employment accounted for by these firms was up from 8.8% in 2007 to 10.2% in 2012. Foreign-owned companies dominate employment in these sectors, apart from agri-food and business services (which is part of internationally-traded services), where indigenous firms predominate. The largest of the five sectors by employment is ICT, within which software is the most significant – showing strong employment growth among both indigenous and foreign-owned agency-assisted firms between 2007 and 2012. On the other hand, employment in med-tech (which is almost completely dominated by foreign-owned companies) has remained stable at about 22,000 employees during the period, while pharma-chem (which is also almost completely dominated by FDI firms) has exhibited contraction in employment, from about 23,000 in 2007 to less than 20,000 in 2012. Pharma-chem has been beset by the so-called ‘patent-cliff’ in recent times and the sector is experiencing re-organisation, partly as a result of the expiry of patents but also due to changing demand, including a detectable trend away from ‘block-buster’ drugs to more specific ‘niche-buster’ solutions targeted at particular groups of patients. Employment in the agri-food sector has also declined; but nevertheless food and drink manufacturing, within the sector, has shown employment growth of about 2,000 people between 2010 and 2012, according to the ABSEI data.

¹⁷⁵ The agencies are Enterprise Ireland, IDA Ireland, Údarás na Gaeltachta and Shannon Development. Companies in the latter agency were re-assigned to EI and IDA Ireland during 2012. The ABSEI 2012, which was released in March 2014, is available at <http://www.forfas.ie/publication/search.jsp?ft=/publications/2014/Title,12012,en.php>.

While the agency-assisted firms active in the first category sectors account for a small minority of all national employment (approximately 10%), they make up a significant majority of the total value of all exports of goods and services from Ireland (over 70%), as shown in Table 8.8. Apart from agri-food, foreign-owned firms contribute the vast majority of exports. The largest exporting sectors are ICT (38% of all exports, with software growing but hardware declining), pharma-chem (21%, steady share since 2007), agri-food (6.5%, growing export value) and med-tech (4.2%) (growing share). Internationally-traded services' share of all exports was 2.3% in 2012, down from 3% in 2007 but noteworthy here is the appreciably strong growth in exports (value and share) among indigenous companies active in international business services.

The inclusion of the word 'convergence' in the first category of sectors means that there are opportunities for *cross-sectoral collaboration* – for example, ICT is an activity pervading all of the sectors in the category and across all categories – and the enterprise development agencies (IDA Ireland and Enterprise Ireland) are assisting enterprises with convergence in mind. As well as the supports to the sectors individually, convergence supports include alliances in R&D and innovation, developing capabilities in leadership and management, growing skills in sales and marketing, and facilitating cross-industry partnerships. Given the established strengths in these sectors, and as a small and flexible country, it is considered that Ireland has a unique opportunity to take a leading role in cross-sectoral convergence, where the emphasis is being placed on meeting consumer demands in technologically effective ways. Further, cross-sectoral convergence is not necessarily exclusive to the sectors identified in this first category of sectors and may also include convergence opportunities between these sectors and sectors in any of the other categories, provided there is an identified market need and an enabling technology can be implemented.

Table 8.8: Employment and Export Performance of Sectors within the National Strengths and Convergence Opportunities Category

Absolute Employment and Exports 2007 and 2012												
Sector	All Companies		Total Employment				Total Exports (€m)					
			Irish Companies		Foreign Companies		All Companies		Irish Companies		Foreign Companies	
	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012
Agri-food	45,860	42,210	36,916	34,219	8,944	7,991	10,862	11,845	5,701	5,832	5,161	6,013
ICT	85,163	89,504	19,428	24,056	65,735	65,448	61,656	68,513	1,580	2,047	60,076	66,466
Hardware	31,609	23,171	7,125	6,932	24,484	16,239	20,657	10,973	550	641	20,107	10,331
Software	53,554	66,333	12,303	17,124	41,251	49,209	40,999	57,540	1,030	1,405	39,969	56,135
Med-Tech	22,013	22,776	71	119	21,942	22,657	5,625	7,746	56	102	5,569	7,644
Pharma-Chem	23,339	19,828	412	502	22,927	19,326	31,177	37,955	211	323	30,967	37,632
Internationally-Traded Services	12,207	13,603	3,885	4,031	8,322	9,572	4,531	4,192	1,536	2,193	2,995	1,999
Financial Services	9,152	10,261	1,474	930	7,678	9,331	3,690	2,616	750	629	2,941	1,986
Business Services	3,055	3,342	2,411	3,101	644	241	841	1,576	787	1,563	54	13
Total	188,581	187,922	60,711	62,928	127,870	124,994	113,851	130,252	9,084	10,497	104,767	119,755
Share of National Employment and Exports 2007 and 2012												
Sector	All Companies		Total Employment				Total Exports (€m)					
			Irish Companies		Foreign Companies		All Companies		Irish Companies		Foreign Companies	
	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012	2007	2012
Agri-food	2.1%	2.3%	1.7%	1.9%	0.4%	0.4%	7.1%	6.5%	3.7%	3.2%	3.4%	3.3%
ICT	4.0%	4.9%	0.9%	1.3%	3.1%	3.6%	40.5%	37.5%	1.0%	1.1%	39.4%	36.4%
Hardware	1.5%	1.3%	0.3%	0.4%	1.1%	0.9%	13.6%	6.0%	0.4%	0.4%	13.2%	5.7%
Software	2.5%	3.6%	0.6%	0.9%	1.9%	2.7%	26.9%	31.5%	0.7%	0.8%	26.2%	30.8%
Med-Tech	1.0%	1.2%	0.0%	0.0%	1.0%	1.2%	3.7%	4.2%	0.0%	0.1%	3.7%	4.2%
Pharma-Chem	1.1%	1.1%	0.0%	0.0%	1.1%	1.1%	20.5%	20.8%	0.1%	0.2%	20.3%	20.6%
Internationally-Traded Services	0.6%	0.7%	0.2%	0.2%	0.4%	0.5%	3.0%	2.3%	1.0%	1.2%	2.0%	1.1%
Financial Services	0.4%	0.6%	0.1%	0.1%	0.4%	0.5%	2.4%	1.4%	0.5%	0.3%	1.9%	1.1%
Business Services	0.1%	0.2%	0.1%	0.2%	0.0%	0.0%	0.6%	0.9%	0.5%	0.9%	0.0%	0.0%
Total as % of National Total	8.8%	10.2%	2.8%	3.4%	6.0%	6.8%	74.7%	71.4%	6.0%	5.8%	68.7%	65.6%

Source: Forfás ABSEI (2012) (supra footnote 175), CSO, Central Bank of Ireland and IMF WEO (April 2014) data, consultancy team analysis.

Emerging Opportunities and Untapped Potential Category

Clean/green technologies (clean-tech)

Arts, entertainment and recreation

Education services

While none of these sectors is fundamentally new to Ireland's economy – each offers further growth potential and new enterprise opportunities as they are impacted by structural change, advances in technology, consumer demands and/or regulatory change. They also have a pervasive influence across the wider economy such that the development of an individual sector within this sectoral category will have a positive impact on others. For example, developments in green technologies directly impact on construction, energy and high technology manufacturing; and arts, entertainment and recreation are an important part of Ireland's tourism offering. Education is a large sector in Ireland and the country benefits by having English as its first language in practice and is well-placed geographically for growing the provision of educational services to meet growing demand in emerging markets; however, it faces tough competition from comparator countries – including Denmark, which is already developing a strong capability in international student learning, and the UK, where the tradition of the British Council and the Commonwealth provides that country with a long-standing reputation that is highly regarded in major emerging economies like China and India.¹⁷⁶

This category of sectors accounted for almost 220,000 jobs or in the region of 12% of all persons at work nationally in 2012. Reliable employment data on the clean-tech sector (particularly newer components of the sector) are difficult to come by (reflecting the still embryonic nature of this activity) but the data suggest that there has been appreciable employment growth in arts, entertainment and recreation and in the provision of education services in recent years.

Table 8.9: Employment in the Category of Emerging Opportunities and Untapped Potential Sectors in Ireland (2007-2012)

Category and Sector	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007-2012)	(2010-2012)	(2011-2012)
Emerging Opportunities and Untapped Potential									
Green and cleantech	25,743	26,207	24,296	22,862	23,293	18,032	-6.9%	-11.2%	-22.6%
Arts, entertainment and recreation	53,366	61,592	55,380	58,480	56,306	59,005	2.0%	0.4%	4.8%
Education	133,729	139,568	139,410	148,983	137,228	140,605	1.0%	-2.9%	2.5%
Sub-Total	212,839	227,367	219,086	230,325	216,827	217,641	0.4%	-2.8%	0.4%
Category % of Total Employment	10%	11%	11%	12%	12%	12%	3.8%	-1.6%	0.6%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes used in compiling the sectors are as follows: green and cleantech (35-38, supplemented with Forfás AES); arts, entertainment and recreation (90-94); and education (85). Further details on the sub-sectors within this category are provided in the Annex (Table A7, p. 283).

¹⁷⁶ The damaging effect of the collapse of some private colleges in Ireland geared towards international students earlier this year is noted and this unwelcome event could adversely affect the educational sector in Ireland more widely in the eyes of overseas students, one of the target segments of the universities (NUI and TCD).

Mature Sectors Category

Manufacturing/engineering
Tourism and hospitality
Retail and wholesale
Transport, logistics and distribution
Property and construction

Often the desire to seek out ‘new’ and ‘smart’ sectors can mean that the role of more traditional and longer-established sectors is considered to be of less importance. However, the latter provide a substantial contribution to employment in Ireland today and will present important employment opportunities – not least for the currently unemployed – as the economic recovery gains momentum. Tourism is a sector that has performed strongly in recent years and has benefitted from government initiatives in the form of The Gathering and the reduced VAT rate. All of the sectors in this category, while mature, generally operate flexibly/pro-cyclically and have the capacity to absorb new employment as the economy recovers. At the same time, however, it is important that the mistakes of the past are learned and not repeated. Prior to the crisis, the construction sector became bloated to the extent of crowding out other activities and the property market reached such a height that when the crash unfolded it hit Ireland especially hard and has been a significant factor underpinning youth and long-term unemployment today (during the property boom, thousands of young people were leaving school early to get jobs as basic construction workers; but when the crash came, their lack of skills and qualifications meant they were unable to find alternative employment and many have since emigrated and those that have remained in the country have tended to persist as long-term unemployed).

Each of the sectors within the third category includes firms that trade internationally as well as those primarily trading in domestic/local markets. Technology advances, together with the reduction in trade barriers for services, enhance the potential to increase exports and internationalisation prospects for firms operating within this category.

Advances in technology are having a transformative impact in that they present ‘new’ niche, high growth opportunities within each of these sectors, including, for example, ‘smart’ construction materials and ‘e-tailing’. At a minimum, the use of ICT across all aspects of the activities can increase productivity and, because of their high employment intensity, the overall contribution of these sectors to GDP growth. Stimulating re-skilling of people in employment is important for these sectors, particularly in IT and in sales and marketing, as is supporting management development.

The importance of the category of mature sectors is exemplified by the fact that they contribute well over 750,000 jobs in Ireland (40%+ of all jobs nationally) with the largest sectors being retail and wholesale (over 250,000), property and construction (in the region of 180,000 but this is down substantially from the almost 375,000 workers at the height of the boom in 2007) and tourism and hospitality (c. 140,000, which has grown in employment in the past 2-3 years). With the exception of construction, which accounted for less than 5% of all jobs within Meath in 2011, the mature sectors are important to the local economy of Meath and will remain so during the medium-term.

Table 8.10: Employment in the Category of Mature Sectors in Ireland (2007-2012)

Category and Sector	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR (2007- 2012)	CAGR (2010- 2012)	CAGR (2011- 2012)
	2007	2008	2009	2010	2011	2012			
Mature Sectors									
Engineering/manufacturing	149,049	136,330	115,209	106,357	101,734	97,314	-8.2%	-4.3%	-4.3%
Tourism and hospitality	147,081	142,358	137,827	135,623	128,178	131,594	-2.2%	-1.5%	2.7%
Retail and wholesale	310,920	309,903	279,034	278,075	276,504	272,709	-2.6%	-1.0%	-1.4%
Transport, logistics and distribution	92,828	95,912	97,332	92,823	96,667	90,328	-0.5%	-1.4%	-6.6%
Property and construction	371,834	330,992	236,011	188,343	186,538	177,687	-13.7%	-2.9%	-4.7%
Sub-Total	1,071,713	1,015,495	865,413	801,220	789,621	769,632	-6.4%	-2.0%	-2.5%
Category % of Total Employment	49%	48%	44%	42%	43%	42%	-3.3%	-0.8%	-2.3%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes used in compiling the sectors are as follows: engineering manufacturing (13-14, 16-18, 22-25, 27-33); tourism and hospitality (55-56, 79); retail and wholesale (45-46); transport, logistics and distribution (49-53); property and construction (41-43, 68, 71, 77, 80-81). Further details on the sub-sectors within this category are provided in the Annex (Table A8, p. 284).

Domestically or Locally-Traded Activities Category

Professional and business services
Medical services
Personal services

Firms trading on the local market are key contributors to employment and Ireland's overall competitiveness. While businesses in these sectors tend to be relatively small, and many are owner-manager-led, often by regulatory requirements (e.g. legal and medical services), they are nevertheless generally productive/profitable operations active in value added services. Public policy can help support the development of these locally-traded services in various ways, for example by ensuring access to competitively-priced, high-speed broadband and equipping people with the right skills to meet the needs of these sectors.

At the same time, however, some of these sectors tend to be relatively sheltered and protected from the forces of competition, sometimes justifiably in order to ensure minimum quality standards and to protect consumers. The Competition Authority, over a number of years, has identified areas where restrictions on competition in professional services are unwarranted or disproportionate (i.e. they are more than necessary to address claimed market failure sources) and, while the professions themselves (through their regulatory/representative bodies) have made some progress in addressing these restrictions, there is still some way to go in respect of certain professions, including the legal and medical professions (which the Troika have consistently highlighted as a key part of Ireland's structural reform process).

The impact of unwarranted or disproportionate restrictions on competition in professional services, or other sectors of the economy, should not be underestimated. They generally give rise to what economists term 'economic rents', which are basically payments to providers over and above what would be necessary to attract and keep them in the activities. Rents are a form of supernormal profits and represent inefficiency because they divert resources away from consumers and towards producers, who reap the rewards of higher payments, underpinned by barriers to competition. This in turn tends to make some professions attractive career options for school-leavers (like the law and medicine) but there is an economic cost to this – namely diversion of talent towards the sectors and away from other activities where their talents might be more successfully employed, and where more economic and employment growth might occur.

On the other hand, activities within the personal services sector tend to be competitive as well as featuring highly committed and entrepreneurial people – often people who have opted for further education as opposed to higher education after secondary school. Businesses in hair and beauty, and related activities, are part-and-parcel of economic life up and down the country and these typically small enterprises together act as an important source of local employment growth. Many of the activities under the heading of personal services are pro-cyclical or income-elastic activities, and therefore are likely to grow and add jobs as the economic recovery gathers momentum during the medium-term. Local authorities like Meath County Council can play an important role in the growth of these businesses, through cost-related rates and facilitating attractive retailing environments to ensure footfall and demand.

In terms of scale, the activities within the domestically/locally-traded services category account for well over 500,000 jobs or approximately 28% of all employment in Ireland today. The largest activities are professional/business (which include solicitors, accountants, insurance and finance practitioners, consultants) and medical (which include health professionals, social workers and residential carers), with approximately 250,000 jobs in each case; while in the region of 35,000 persons are engaged in personal services.

Table 8.11: Employment in the Category of Domestically/Locally Traded Sectors in Ireland (2007-2012)

Category and Sector (NACE)	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007-2012)	(2010-2012)	(2011-2012)
Domestically/Locally-Traded Services									
Professional/business	263,664	258,832	253,830	244,150	234,265	237,263	-2.1%	-1.4%	1.3%
Medical	218,877	221,939	235,898	240,289	243,515	244,998	2.3%	1.0%	0.6%
Personal	32,910	33,216	33,779	30,456	29,688	32,748	-0.1%	3.7%	10.3%
Sub-Total	515,451	513,987	523,507	514,894	507,467	515,009	0.0%	0.0%	1.5%
Category % of Total Employment	24%	24%	27%	27%	27%	28%	3.3%	1.2%	1.7%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes used in compiling the sectors are as follows: professional/business (53, 64-70, 72-75, 78, 82 and 84); medical (86-88); personal (95-97). Further details on the sub-sectors within this category are provided in the Annex (Table A9, p. 285).

Assessment of Sectoral and Sub-Sectoral Prospects for Meath 2014-2020

We now proceed to bring together the POWSCAR sectors making up the baseline employment situation in Meath with the disaggregated sub-sectors from the framework outlined above to present our assessment of the various sectoral and sub-sectoral prospects for the county during 2014-2022. The assessment is most effectively presented in tabular form and reflects (1) the baseline employment situation (in particular, the sectoral results shown earlier in Table 8.4, p. 175), (2) the comparative economic strengths of Meath presented in the focused economic profile of the county in Section 7, including the county's unique and extensive commuter resource, and (3) examination of national and international drivers of each of the sub-sectors making up the framework. The latter piece is provided for in a series of SWOT-type analyses for the disaggregated sub-sectors, the details of which are given in the Annex at the end of the report (Box A4-Box A18, pp. 286-299).¹⁷⁷ The consultancy team's assessment of sectoral and sub-sectoral prospects is divided into three tables as follows:

- Agri-food and manufacturing-related activities – Table 8.12;
- Construction, wholesaling/retailing and ICT/professional/financial activities – Table 8.13; and
- Non-market or public sector and other services activities – Table 8.14.

Agri-food and Manufacturing-related Activities

Our overall assessment from Table 8.12 overleaf is as follows:

- The agri-food sector, which includes manufacturing/processing as well as primary production, has the potential to grow in line with overall employment (nationally) and in Meath can retain its share of all employment within the county in 2022;
- The same is true of other manufacturing, engineering, mining and related activities in Meath, where, like agri-food manufacturing, competitiveness (in regard to both costs and exports) will be key to sustaining performance;
- Med-tech/life sciences/biotechnology is one of the manufacturing sectors in Meath with the potential to see employment growth through more FDI, and key to this will be to proactively promote the county as a cost-competitive location with access to a large and varied range of skills, given its proximity to and transport links with Dublin and the extensive commuter population (Alltech would be an example of an existing FDI firm in the county in this regard);
- On the other hand, the prospects to develop pharma-chem in Meath are limited, for a variety of reasons – including the fact that other parts of the country have established strong bases of FDI in the sector over many years plus structural issues confronting the sector currently and in the coming years (namely drugs coming off patent, M&A and industry rationalisation internationally and changing patterns of demand (e.g. from blockbuster treatments to more personalised treatments or niche-buster solutions) which are forcing major companies to re-think their strategies and plans);
- The green and clean-tech sector is also beset with issues and is likely to remain a sector with low-moderate employment impact over the medium-term, despite its undoubted importance in the wider context of combating climate change and the need to develop renewable energies.

¹⁷⁷ Fifteen separate and detailed profiles of the sub-sectors making up the framework (Figure 8.3, p. 183) are presented, in the order according to the categories of the framework, beginning with the category of national strengths and convergence opportunities (agri-food, med-tech etc.) and finishing with the category of domestically/locally-traded activities.

Sub-Section 4.4 of the Meath CDP 2013-2019 (as varied) highlights the potential of developing biomass activities as part of rural development, which is appropriate in that context.

Thus, key sectors will continue to be agri-food (primary and manufacturing) and traditional manufacturing, engineering, mining and quarrying, and we believe there are also opportunities to develop high-tech manufacturing employment in med-tech/life sciences/biotechnology in Meath, through FDI.

Table 8.12: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) – Agri-food and Manufacturing-related Activities

Sector	Sub-Sector	Prospects for Meath by 2022
1 Agricultural, forestry & fishing	1.1 Agri-food	Growth in line with overall employment nationally; focus on processing/manufacturing as well as primary production; maintain employment share; exports key and achieving scale in manufacturing end
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	2.1 Manufacturing/engineering/mining	Meath well-placed to sustain performance - but staying competitive and growing exports will be key
	2.2 Med-tech	Meath can grow FDI in med-tech by positioning itself as cost-competitive location with quantum/range of skills
	2.3 Pharma-chem	Prospects limited due to strength of existing locations elsewhere
	2.4 Green and clean-tech	Still embryonic; uncertainty over technologies and their realisation; low-medium employment impact

Source: Consultancy team review and analysis.

Note: The corresponding detailed profiles of the disaggregated sub-sectors are presented in the Annex as follows: agri-food (Box A4, p. 286, and Box A10, p. 292); manufacturing/engineering/mining (Box A10, p. 292); med-tech (Box A6, p. 288); pharm-chem (Box A7, p. 289); and green and clean-tech (Box A15, p. 296).

Construction, Wholesaling/Retailing and ICT/Professional/Financial Activities

Like the previous set of sectors, the set under this heading features sectors and sub-sectors with varying degrees of positive employment prospects in Meath in the coming years. *Particularly important sub-sectors here are ICT (software), international financial services and international business services – all of which can be grown in Meath through a combination of indigenous enterprise development and greater FDI – to such an extent that we envisage that a significant positive shift in the share of all employment in Meath attributable to ICT/professional/financial/business services (internationally-traded) can be achieved by 2022.* The assessment of employment prospects are shown in the next table overleaf.

Table 8.13: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) – Construction, Wholesaling/Retailing and ICT/Professional/Financial Activities

Sector	Sub-Sector	Prospects for Meath by 2022
3 Construction	3.1 Property and construction	Small increase in employment share inevitable under recovery but mistakes of the past must be avoided
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	4.1 Tourism and hospitality	Meath well-placed to offer complementary tourism - sports, events, eco, cultural - steady employment growth
	4.2 Retail and wholesale	Steady growth likely in line with overall employment growth
	4.3 Transport, logistics and distribution	Growth reflective of overall employment growth; added possibility of development of Bremore site
5 Information and communication, financial, real estate, professional, administration and support service activities	5.1 ICT	Strong prospects in software/services with above average employment growth; aim to maximise growth among those living and working in Meath; promotion of county as cost-competitive location with skills
	5.2 International financial services	Like ICT (software/services)
	5.3 International business services	Like ICT (software/services)
	5.4 Domestic/local professional services	Employment growth in line with overall employment growth
	5.5 Domestic/local business services	Same as for previous activity (5.4)

Source: Consultancy team review and analysis.

Note: The corresponding detailed profiles of the disaggregated sub-sectors are presented in the Annex as follows: property and construction (Box A14, p. 295); tourism and hospitality (Box A11, p. 293); retail and wholesale (Box A12, p. 294); transport, logistics and distribution (Box A13, p. 295); ICT (Box A5, p. 287); international financial services (Box A8, p. 290); international business services (Box A9, p. 291); domestic/local professional services and domestic local business services (Box A18, p. 299).

Non-Market/Public Sector and Other Services Activities

Finally, Table 8.14 below summarises the consultancy team's assessment of employment prospects in regard to primarily non-market/public sector services and other services activities (market-oriented), where there are fiscal constraints stemming from national economic policy (EU Fiscal Compact conditions) but nevertheless there are some possibilities for Meath, including the proposed regional hospital in Navan and the possible development of Dunboyne College of Further Education.

Table 8.14: Summary Assessment of Sectoral and Sub-Sectoral Employment Prospects for Meath (2014-2022) –Non-Market/Public Sector and Other Services Activities

Sector	Sub-Sector	Prospects for Meath by 2022
6 Public administration and defence; compulsory social security	6.1 Predominantly non-market services	Limited employment growth prospects due to agreed fiscal requirements
7 Education, human health and social work activities	7.1 Predominantly non-market services	Limited employment growth prospects due to agreed fiscal requirements but nevertheless possibilities of new Navan hospital and development of Dunboyne College of FE
8 Other service activities	8.1 Arts, entertainment and recreation	Growth prospects linked with overall employment growth and tourism growth
	8.2 Education (predominantly market services)	Limited potential due to low third-level institution presence in Meath but opportunities in ICT, adult education and CPD - impact greater with expanded Dunboyne College of FE
	8.3 Personal services	Employment growth in line with overall employment growth (possibly higher)

Source: Consultancy team review and analysis.

Note: The corresponding detailed profiles of the disaggregated sub-sectors are presented in the Annex as follows: sectors 6 and 7 (education and medical services) (Box A17, p. 298, and Box A18, p. 299); arts, entertainment and recreation (Box A16, p. 297); and personal services (Box A18, p. 299).

Input 3: Spatial Assessment – Potential Identified Sites for Economic Generation

The assessment of the spatial dimension to the Economic Development Strategy for Meath reflects the settlement hierarchy provided for in Meath CDP 2013-2019 (as varied) and the RPGs of the GDA 2010-2022.¹⁷⁸ Table 4.2 of the Meath CDP (as varied) sets out the hierarchy of economic centres and targeted sectors in Meath, which also forms the basis of the consultancy team's spatial assessment. An important part of our spatial assessment has been to consider a number of sites for potential employment development around the county. In order to structure the thinking regarding the sites, we have grouped them according to (1) principal transport corridors (namely the M1, M2, M3 and M4) and (2) economic centres within the transport corridors, and then we have proceeded to observe their current zoning intensities, along with their advantages and issues from a spatial planning perspective. We finally come to an overall assessment of the sites (tabulated at the end of the piece).

An important part of the delivery of the sites for investment purposes will be for Meath County Council to ascertain all the infrastructure and services available on the identified sites, and also to have plans to deal with any issues or bottlenecks in relation to the sites – this piece will inevitably be site-specific and different sites will have their own issues and requirements in the delivery process. Accordingly, at the end of this part of the Economic Vision formulation, we set out a matrix of services etc. in respect of the sites, for which Meath County Council should seek to complete as soon as possible in the implementation process of the Economic Development Strategy – this information will be of the essence in the Council's dealings with future FDI inquiries, site visits etc. that may eventually lead to new FDI and thus new jobs in the county.¹⁷⁹

Criteria for Identification of the Sites

The identification of the sites reflects the strategic planning context of the NSS 2002-2020 and the RPGs of the GDA 2010-2022, as well as the Meath CDP 2013-2019 (as varied).¹⁸⁰ According to the NSS:

“Strong cities and towns are needed to support a competitive business environment, working in partnership with strong rural areas and ensuring an effective supply of employment opportunities and services. This enables areas to hold on to existing population, both urban and rural, and attract more people”.¹⁸¹

The identification of the sites is also based on the existence of a number of radial multi-modal corridors, traversing the county and extending across both Meath's Metropolitan and Hinterland Areas outwards from the National Gateway (Dublin) core. Accessibility both on the national road network and to public transport are also considerations in identifying the development potential of the sites. In identifying the sites, we have also liaised with Meath County Council.

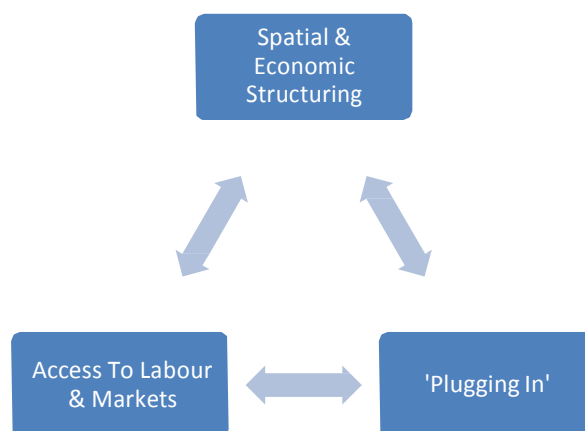
Thus, the spatial dimension has regard to Meath's existing spatial and economic structuring (including smaller settlements), and access to infrastructure, labour and markets. It is also alert to the need to incentivise a succinct number of strategic sites within key employment locations as strategic employment zones to plug into the requirements of the enterprise agencies and businesses themselves.

¹⁷⁸ See Table 3.1-Table 4.2 (p. 49-61) and the discussion around them, which also includes consideration of the designations attributed to Meath settlement areas in the NSS 2002-2020.

¹⁷⁹ Owing to space constraints, detailed maps of the sites are not included in this report but are available from Meath County Council. A high-level map linking the economic and spatial elements is given at the end of this piece (Figure 8.4, p. 215).

¹⁸⁰ The earlier Table 4.2 (p. 61) maps the settlements of Co. Meath against each of these policy documents.

¹⁸¹ NSS (2002), Section 2.6, p. 35.

Box 8.1: Guiding Principles of the Spatial Dimension to the Economic Development Strategy for Meath

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
- This principle also recognises the national, regional and local economic contexts, and the economic importance of ensuring clustering and agglomeration in the main urban areas, where economic impact tends to be maximised
- This principle also recognises the important role of smaller settlements/rural economic development in County Meath and the importance of attractive town centres in all settlement areas (large and small)

Access To Labour & Markets

- Maximising locational advantages of strategic growth centres based on the concept of economic corridors, including proximity to airports/ports, multi modal transport facilities, and location within the Metropolitan Area of Meath

Plugging In

- To Identify and incentivise a succinct number of strategic sites within key employment locations as strategic employment zones to 'plug into' the requirements of enterprise agencies and businesses (at all stages of the business life-cycle and including foreign-owned and indigenous enterprises)
- At the same time, the spatial planning within Meath County Council should not seek to be overly prescriptive about planning hierarchies (for example by using the hierarchies to (inadvertently) block the prospect of economic development and jobs in areas with low rank in the economic hierarchy in the Meath CDP (as varied). Council officials need to work with and facilitate, within reason, wealth creators and developers *flexibly*.

Source: Meath County Council, consultancy team review and analysis.

Box 8.2: County Meath Urban Settlements Hierarchy and Role of Settlements

Type of Settlement	County Meath Settlement Hierarchy Centre	Description	Possible Population (2022)
Large Growth Town I	Navan, Drogheda Environs	Key destination, economically active supporting catchment areas, located on multi-modal corridor (Drogheda) and potential multi-modal corridor (Navan).	Up to c. 50,000
Large Growth Town II	Dunboyne, Maynooth Environs	Smaller in scale than Large Growth Town I but nevertheless strong active growth towns, economically vibrant with high quality transport links to larger towns/city (Dunboyne in the Metropolitan Area of Meath).	c. 15,000-30,000
Moderate Sustainable Growth Town	Ashbourne, Kells, Trim, Kilcock Environs and Dunshaughlin	10km from large town on public transport corridor, serve rural hinterlands as market towns.	5,000-15,000
Small Town	Athboy, Berrystown, Laytown, Mornington East, Duleek, Enfield, Oldcastle, Ratoath, Stamullen	Good bus or rail links; 10km from large growth towns.	1,500-5,000
Village	Ballivor, Carlanstown, Carnaross, Clonard, Clonee, Crossakiel, Donore, Drumconrath, Gibbstown, Gormonston, Julianstown, Kentstown, Kilbride, Kildalkey, Kilmainhamwood, Kilmessan, Longwood, Mornington/Donacarney, Moynalty, Nobber, Rathcairn, Rathmolyon, Slane, Summerhill	Serve smaller rural catchments, provide local services with some smaller scale rural enterprises in a number of such villages.	Up to 1,000

Source: Meath County Council, consultancy team review and analysis.

Note: See earlier Table 4.1 (p. 60) and Table 4.2 (p. 61).

Accessibility on the National Road Network

Meath is strategically and uniquely located on the national road network. The M1, M2/N2, M3/N3, M4, M6, N51 and N52 all bisect the county. Accessibility to the national road network is an important consideration for product-based economic development such as those within the sectors of industrial/manufacturing and warehousing/transport/logistics.

Connectivity to Public Transport

Existing public transport connections servicing County Meath include frequent bus services and rail services, including the Dublin-Belfast railway line passing through the east of the county, the Dublin-Sligo railway line passing through the south of the county and the Navan-Drogheda-Dublin Port freight railway line. Significant public investment has recently been made in constructing Phase I of the Navan-Dublin railway line, which at the present time terminates at Pace in the south of the county. Phase II of the proposed development includes the possibility of extending the railway line from Pace to Navan, thereby completing the Navan-Dublin railway line.

Connection to public transport links and residential catchment areas are important considerations for people-intensive developments accommodating high density employee numbers and having limited commercial traffic.

Importance of Economic and Competitiveness Considerations Too

While transport connections and servicing of public transport specifically are generally important considerations in respect of appraising sites (for product- and people-intensive developments), it is also important to bear in mind key economic facts stemming from the composition of employment in Meath and the necessity of avoiding possible contradictions or 'own goals' (inadvertently) in otherwise well-intentioned local authority planning. A case in point is the envisaged Navan-Dublin railway line. While this would naturally enough boost public transport in the county, which is generally to be welcomed, there is at the same time a possible risk that it could also reinforce Meath's commuter county status and heighten its role as a satellite location in respect of Dublin. This (unintended) outcome would be at variance with the overall objective of the Economic Development Strategy, and possibly with the overall vision provided for in the Meath CDP, namely to *retain more economic impact and sustainable economic development within the county* – a key part of which will be to harness the county's commuter resource to achieve more 'reverse commuting' to ensure more high value employment within Meath. The second phase of the proposed Navan-Dublin railway line (linking Pace and Navan) has been deferred due to exchequer funding constraints but Phase II might possibly become 'live' again during the lifetime of the Economic Development Strategy (2014-2022), in which case the extent of its economic impact would need to be carefully considered (it may result in raising the rate of outbound commuting from the county, other things being equal, but at the same time it might also trigger some commuters currently travelling by car to use the new railway, in which case we believe it would be relevant to establish and quantify the likely costs and benefits of the scheme).

An example of how transport infrastructure can affect local economic development is provided by the performance of retailing in Meath. With the significant improvements in road transport throughout the county, which have served to better connect the county with the Dublin Region, and which are generally beneficial, there has also occurred 'retail leakage' from the county. In particular, the retail leakage has been seen to affect 'comparison shopping' in Meath: the aforementioned survey conducted as part of the 2011 Meath County Retail Strategy found significant levels of comparison expenditure leakage from the county with almost 60% of residents carrying out their main comparison shopping (clothing/footwear) outside the county (for example, in large out-of-town retail centres in Dublin).

Categorisation of the Sites by Economic Development Zoning

Category E1 – High Technology

Three employment-based land use categories are identified in the CDP, beginning with:

“E1 Strategic Employment Zones (High Technology Uses): To facilitate opportunities for high technology and major campus style office based employment within high quality and accessible locations”.¹⁸²

The following guidance is set out within the CDP in respect of E1 zoned lands:¹⁸³

“E1 zones facilitate opportunities for high end, high value added businesses and corporate headquarters. This adheres to the concept of 4th Generation Science & Technology Parks. It is envisaged that such locations are suitable for high density employment generating activity with associated commercial development located adjacent to or in close proximity to high frequency public transport corridors. This will apply to suitable lands in Navan, Drogheda and Dunboyne. The Maynooth Environs Local Area Plan also contains E1 zones albeit qualified by a Local Objective”.

In regard to permitted uses on such zoning, the CDP mentions the following:¹⁸⁴

“Bio Technology Manufacturing, Call Centres, Childcare Facility, Convenience Outlet, Green/Clean Light Industries, High Technology Manufacturing, Information Communication Technologies, International and National Traded Services, Knowledge Based Economic Development, Offices 100 to 1,000 sq. m., Offices>1,000 sq. m., Research & Development, Science & Technology Based Enterprise, Telecommunication Structures, Water Services / Public Services”.

Category E2 – General Enterprise and Employment

The next employment-based land use category provided for in the Meath CDP is as follows:

“E2 General Enterprise & Employment: To provide for the creation of enterprise and facilitate opportunities for employment through industrial, manufacturing, distribution, warehousing and other general employment/enterprise uses in a good quality physical environment”.¹⁸⁵

The CDP sets out the following guidance in respect of E2 zoned lands:¹⁸⁶

“E2 lands constitute an important land bank for employment use which must be protected. The development of E2 lands seek (*sic.*) to provide for the creation and production of enterprise and facilitate opportunities for industrial, manufacturing, distribution, warehousing and other general employment/enterprise uses in a good quality physical environment”.

The CDP provides different guidance for the development of E2 zoned lands within each of three categories of centre as follows (the overall effect of which, in our view, may be to complicate the overall economic zoning and planning guidance).

¹⁸² Volume 1 of the CDP, Table 2.8 (p. 38).

¹⁸³ *Ibid.*, p. 44.

¹⁸⁴ *Ibid.*

¹⁸⁵ *Ibid.*, p. 45.

¹⁸⁶ *Ibid.*

Firstly, Category 1 centres are identified as the “Primary & Secondary Economic Centres as provided for in Core Strategy (Navan, Drogheda, Dunboyne, Ashbourne, Kells)”.¹⁸⁷ CDP guidance on Category 1 centres is as follows:

“Within Category 1 centres, E2 zones provide for industrial and related uses subject to the provision of necessary physical infrastructure. They allow the full range of industrial processes to take place within a well-designed and attractive setting that provides employment opportunities. In established industrial areas, Meath County Council will seek to ensure that non industrial uses are limited to prevent potential land use conflicts developing”.¹⁸⁸

Secondly, Category 2 centres are identified as “Remaining Moderate Growth Towns as provided for in Core Strategy (Trim, Kilcock Environs, Dunshaughlin)” with the following guidance:¹⁸⁹

“The County Development Plan identifies that Category 2 centres should cater primarily for small to medium scale enterprise and manufacturing uses allowing for the full range of industrial processes to take place within a well-designed and attractive setting. The development of small to medium scale office based industry will be accommodated in Moderate Growth Towns on suitable sites”.

Lastly, Category 3 centres are identified in the CDP as “Lower-tiered settlements (Small Towns & Villages as provided for in Core Strategy of the CDP)” with guidance:¹⁹⁰

“These centres should cater primarily for small scale enterprise and manufacturing which focus on incubator units, workshops, creative industries, small businesses, repairs, warehousing, distribution, open storage and transport operating centre type activities. The development of inappropriate uses such as office based industry and retailing will not be accommodated in lower tier centres. It shall be a requirement of an applicant to demonstrate the suitability of a proposed heavy industrial use within such land use zoning objective to Meath County Council”.

Category E3 – Warehousing and Distribution

The third and last employment-based land use category provided for in the CDP is as follows:¹⁹¹

“E3 Warehousing & Distribution: To facilitate logistics, warehousing, distribution and supply chain management inclusive of related industry facilities which require good access to the major road network”.

Assessment of the Employment Categories in the Meath CDP (As Varied)

In broad terms, the E1 land use zoning objective as set out in the CDP is designed to accommodate people-based economic development and Objectives E2 and E3 seek to accommodate product-based economic development.

¹⁸⁷ *Ibid.*

¹⁸⁸ *Ibid.*

¹⁸⁹ *Ibid.*, p. 46.

¹⁹⁰ *Ibid.*

¹⁹¹ *Ibid.*, p. 47. No guidance is given in relation to E3 zoning in the CDP. Permitted uses for E3 zoning include bring banks, waste-to-energy facilities, recycling (civic and amenity), fuel depots etc.

People and product activities generally have varying locational requirements: the latter, for example, rely on ease of connection to the national road network; while the former rely on access to large residential catchments (skills) and access to public transport (although not exclusively as it is sometimes the case that senior personnel in people-based developments prefer to travel to and from work by car, giving them more flexibility in terms of meetings/client engagement or travelling onwards – for example, by airport).¹⁹² People-intensive employment accords with knowledge-intensive economic activities and is generally earmarked with larger settlements with greater skills availability.

Assessment of the Sites by Corridor and Economic Centre/Settlement Area

M3 Corridor

Centre within the M3 Corridor: Dunboyne and Environs

The Dunboyne/Clonee/Pace corridor occupies a strategic location within the GDA Metropolitan Area. Dunboyne is located adjacent to the southwest boundary of County Meath with Fingal County Council. It lies approximately 2km west of the M3 and is connected to the M3 by the R156 (Mullingar to Clonee *via* Summerhill) and R157 (Maynooth), which converge in the centre of the town.

With a population of almost 9,500 in 2011, Dunboyne has grown rapidly over the past number of years. It has a wider population of around 260,000 people within a 15-minute and about 1.6 million from a catchment area within a 45-minute drive.

There are a number of established business and enterprise areas in Dunboyne. Located along the Dunboyne/Clonee/Pace corridor, these offer favourable locations, ready-to-go sites, fibre-based broadband and telecoms, power and gas, water and wastewater, easy access to the national motorway network and are in close proximity to Dublin Airport Dublin Port. Current businesses located in the Dunboyne area include Alltech Ireland and the Kepak Group.

Investments in transport infrastructure, including the rail spur to Parkway in Dunboyne, together with the area's proximity to Dublin Airport and the seaports at Dublin, Drogheda and Dundalk, along with the M3, facilitate the centre's access to international and national markets and suppliers.

The RPGs for the GDA 2010-2022 and the Meath CDP 2013-2019 identify Dunboyne as a 'Large Growth Town II'¹⁹³ and the latter observes that (p. 62):

"These towns have a complementary and supporting role to Navan and Drogheda as the primary economic centres in the county. It is desirable to strengthen the connections between the towns of Dunboyne and Ashbourne, both physical and in terms of achieving more integrated planning and joint strategising to maximise the potential afforded by the linked centre status ... The Ashbourne/Dunboyne economic growth area experiences high levels of outward commuting to Dublin, and it is important that economic stimuli measures are underpinned by necessary supporting infrastructure investment, particularly in relation to water and waste water services".

¹⁹² As revealed earlier in footnote 160 (p. 146), analysis of the CSO POWSCAR reveals that, among the 7,438 outbound commuters working as employers and managers in 2011, 6,560 or 88.2% travelled to and from work by private transport (car); and of the 2,859 outbound commuters working as higher professionals in that year, 2,382 or 83.3% travelled in this manner.

¹⁹³ See Table 4.2 (p. 61).

The RPGs for the GDA recognise (p. 74) that Dunboyne has yet to realise its long-term potential but nevertheless plays an important role given its status and location on a developing rail line. It is also located strategically on the edge of the Dublin Gateway in an area with a high FDI presence and the designation of Dunboyne within the GDA retail hierarchy illustrates the economic potential of the town over a designated time span.

The Parkway railway station, which opened in 2010, is located to the eastern periphery of the town. The station is located on a spur off the Maynooth commuter rail line (joining at Clonsilla) and is served by commuter services with a frequency of approximately every half hour during peak times. Journey times to Dublin Docklands are approximately 30 minutes. The Dunboyne/Pace/Clonee centre is also served by a number of frequent Dublin Bus and Bus Éireann services linking it with Dublin City Centre.

It is also relevant to note the position in respect of the M3/N3 Strategy between Meath County Council, Fingal County Council and the NRA. The strategy represents the agreed position of the parties in relation to the delivery of future improvements and modifications to the N3 national route and its junctions between the tie-in point of the N3 with the M50 Upgrade Scheme and the tie-in point of the N3 with the M3 PPP Motorway Scheme. The N3 mainline is to be upgraded to a dual 3-lane carriageway from the M50 to Clonee, of approximate length 6.3km. The proposed road type will consist of three 3.5m wide lanes in both directions with a central median approximately 2.6m wide. The N3 inbound will also include a bus lane from the Meath/Dublin county boundary. Future local roads may connect to an upgraded Castaheany/Clonee Junction; however, such roads will not otherwise connect to the N3 between M50 Junction 6 and Clonee. No junctions that are additional to those contemplated in this agreement will be permitted on the N3 between M50 Junction 6 and Clonee. Private sector developments predicated on any of the proposals attributed to the upgrading of the Clonee/Castaheany Junction will be required to provide funding or part-funding for the works and such funding will not be eligible for offset against development levies (the consultancy team is informed by Meath County Council) (this aspect was in place before the consultancy team's involvement in this study).

Sites within the Dunboyne/Pace/Clonee Centre on the M3 Corridor

A number of sites have been considered by the consultancy team, including the site located at **Pace**. With an approximate size of 50 hectares, part of the site is identified as a Framework Plan area within the Meath CDP 2013-2019 (Volume 5 – new volume under Variation No. 2) (PACE OBJ 1); the remainder of the site is zoned White Land (WL) and subject to Specific Objective PACE OBJ 2. Both portions provide for the possibility of high-end office usage.

In Volume 5 of the Meath CDP (as varied), PACE OBJ 1 provides that:

“To prepare a unitary Framework Plan for the designated Level 2 Retail Centre at Pace which will address land use, transportation, connectivity, urban design, recreation and implementation issues. Delivery of the Level 2 Retail Centre shall be phased and co-ordinated in tandem with infrastructural provision across the Corridor Area. It shall be a grounding objective of this Framework Plan to encourage development in a sustainable, co-ordinated and efficient manner where such development is facilitated and accompanied by the required infrastructure and services. The Framework Plan shall provide, inter alia:

- for retail floorspace and associated facilities to include some high density and other appropriate residential development commensurate with population growth over the time period of the County Development Plan having regard to the commitment in the Regional

Planning Strategy for Dunboyne to grow from a Level 3 to a Level 2 Centre gradually over a 15 - 20 year timeframe;

- high end office based employment uses at levels commensurate with its location and proximate to a multi modal public transport interchange;
- a pedestrian and cycle route over the M3 Motorway to lands to the east subject to the agreement of the National Roads Authority.

“The preparation of the Framework Plan shall have regard to and generally be consistent with the Integrated Framework Plan for Land Use and Transportation as required pursuant to in the Meath County Development Plan 2013-2019 and other policies and objectives of the County Development Plan, the Regional Planning Guidelines and the 2008 – 2016 GDA Retail Strategy. Strategic Environmental Assessment and Appropriate Assessment of the IFPLUT [Integrated Framework Plan for Land Use and Transport Planning] shall be carried out”.

A study for the Dunboyne/Clonee/Pace area is currently being prepared on behalf of Meath County Council. According to the Meath CDP 2013-2019 (as varied) (Volume 1, pp. 78-9) (our italics):

“Unparalleled economic development opportunities exist adjacent to M3 Parkway ... Potential exists to develop a synergy between this area of Dunboyne and Maynooth Environs in relation to complementary Life Science/SMART Park campuses in partnership and collaboration with established third level institutions”.

In regard to the WL portion of the Pace site, PACE OBJ 2 of the Meath CDP (as varied) provides that:

“To provide for strategic employment use predominantly for high end office development on lands adjacent to the emerging preferred location for the future Level 2 Centre at Pace on a phased basis within the life of the County Development Plan as identified on the land use zoning objectives map”.

Overall, the Pace site represents a key opportunity for high-density employment within the Metropolitan Area of Meath. It benefits from both strong public transport connections together with direct access to the M3 and has the potential to play a significant role in accommodating employment generating development within the county. We note that the proximity of the site to the Tolka River Floodplain might act as a potential barrier to the full extent of the site. Measures to mitigate any flood risk impact may need to be taken into consideration.

Regarding the other sites within the Dunboyne/Pace/Clonee centre on the M3 Corridor, the site at **Portan, Clonee** is zoned for a mixture of E2 and E3 employment land uses. The site is considered to be suitable for large scale warehousing or similar non-people intensive land uses. In any event, development of limited traffic generating land uses may not generate significant additional traffic on the existing network that would necessitate significant upgrade in advance of development occurring. This matter can be addressed by the submission of a Traffic Impact Assessment as part of the normal planning application process. The lands are served by an existing roads layout and access/egress to the M3 Motorway are available *via* the combined Clonee and Castaheany junctions.

The other site considered within Dunboyne/Pace/Clonee centre is that at **Bracetown** (c. 32 ha, currently zoned E2 and E3, with planning permission relating to Bracetown Business Park extended to 19 September 2015). While there is limited pedestrian connectivity between the site and the M3 Parkway, this is unlikely to be a significant issue given the intended product-intensive nature of the site. In view of the site's potential site for light industrial/manufacturing/warehousing, we would recommend that Meath County Council determines the extent of access and services needed to deliver the site for the intended usage. The configuration of the existing employment zoning objectives pertaining to the site is fragmented and it is considered that opportunities to consolidate this zoning objective to provide for a presence along the R147 could be considered.

Centre within the M3 Corridor: Navan

Navan is the County Town of Meath and identified as a Primary development Centre in the NSS. In both the RPGs for the GDA and the Meath CDP, Navan is designated as a Large Growth Town I (along with the Drogheda Environs in Meath).¹⁹⁴ Meath's two IDA Business and Technology Parks are located in Navan and Drogheda and are therefore critically important to the realisation of the Economic Development Strategy. However, the significant spare capacity on these sites is a cause for concern and is part of the reason for Meath's low FDI compared with other parts of the GDA. Creative and/or proactive solutions therefore need to be considered regarding how to ensure more effective functioning of these key facilities and these are signalled below and outlined further in Section 9.¹⁹⁵

In terms of access and transport provision, Navan is easily accessible by the national road network, being located on the M3 Motorway. The M3 connects Navan with Kells to the north-west (approximately 20km) and Dublin to the south-east (around 50km or less than one hour's drive-time). The M3 route travelling south-east also connects Navan with Dunshaughlin and Dunboyne. Navan is also located on the N51 national road, connecting with Drogheda to the east (approximately 26km) and Mullingar to the west (approximately 52km). The N51 route traverses the scenic Boyne Valley, one of Fáilte Ireland's signature tourism destinations.

Navan is also accessible by bus, with Bus Éireann operating a number of services through Navan, notably the service between Dublin and Cavan, with services operating every 15 minutes at peak times in the mornings and afternoons, with half-hour service thereafter. This service also serves Kells and Dunshaughlin. Other bus services connect Navan with Drogheda, Slane and Trim.

¹⁹⁴ Navan is the only Large Growth Town I located *entirely* within Meath; Drogheda straddles both Louth and Meath.

¹⁹⁵ The Navan IDA park currently hosts Generali International and Generali Pan Europe, Aria Assistance, Welch Allyn, BT Ireland-ECAS, and An Garda Síochána. In 2013, Meath County Council relocated its new corporate headquarters offices to the park. There are adequate amounts of land within the park for further development of a broad range and mix of uses. There is also a substantial vacant building on the site, which might have employment use during the Strategy period.

The first phase of the proposed railway linking Navan to Dublin opened in September 2010. Over 25 trains each way per day now run between the new M3 Parkway Station at Dunboyne and Dublin Docklands Station. Iarnród Éireann had proposed extending the existing line from the M3 Parkway Station to Navan. However, this project has been deferred due to the reduction in the exchequer capital investment programme. The proposed extension will consist of 34km of railway line with stations at Dunshaughlin, Kilmessan, Navan town centre and a further station on the northern edge of Navan.

Navan has seven key business enterprise zones, all of which benefit from a widely dispersed fibre-optic ring delivering high speed broadband. Employment and enterprise land uses have been provided for at a number of locations to the north, west, south west and south east of the town including Beechmount Home Park, the Knockumber area and Mullaboy Industrial Estate. Navan also includes lands that have been identified for Strategic Employment Zones and General Enterprise in order to allow extra flexibility in the range of uses which can be catered for on the said lands.

Sites within the Navan Centre on the M3 Corridor

The **IDA Business and Technology Park** in Navan comprises serviced lands for both people- and product-intensive economic activities (E1 High Technology – knowledge-oriented services and manufacturing). About 27 hectares (ha) is available for development/FDI currently. The IDA has no buildings available at the park; although there is a substantial privately-owned building in the park, extending to over 2,500 m² or over 27,000 ft², which is available for tenancy. The park is suitable for ICT (software services, consultancy, global services, games etc.), international financial and business services (funds administration, customer service centres), med-tech/life sciences/biotechnology manufacturing and clean/green technologies etc., which can be developed given skills and access. The IDA site is developed and maintained to a high standard; has important existing tenants (including FDI); and will also see the re-location of Meath County Council's new offices (planning and other functions in the one location).

The site is strategically located in terms of connections and the national road network, and the proximity of an extensive residential catchment renders the site suitable to accommodate a high-density people-intensive format of employment development. There are no significant barriers to the delivery of the site and it is considered suitable for development. Access and connections to services are well-established through existing developments within the site and a more than adequate quantum of land remains available to provide for substantial additional employment creation during the lifetime of the Meath CDP.

However, the large extent of unoccupied lands on the site is also seen as a drawback, which might be viewed by potential inward investors as a shortcoming. There are no plans to construct any new buildings on the site, which could be important for new FDI: as outlined earlier in Section 2 in the discussion of the importance of FDI to economic development in Ireland, the availability or planned delivery of advance buildings for high-tech uses is a key factor in the FDI process.

What therefore needs to happen with the IDA park in Navan is a renewed sense of purpose, with the objective of raising the profile of the site in the eyes of IDA Ireland and potential inward investors, and this needs to occur quickly on foot of this report. Given the general paucity of significant FDI in Meath over the years, and competition from other IDA, and non-IDA sites around the country, a proactive approach needs to be adopted, with Meath County Council taking the lead.

We understand that previous efforts made/proposed by Meath County Council to forward-fund the planning phase of possible office development on the site were not accepted by the IDA. An alternative approach would be for Meath County Council and/or private interests to acquire the lands and promote them in tandem with the IDA with the purpose of attracting FDI in keeping with what can be delivered at the site (namely people-intensive E1 activities).

The proposal to acquire and/or develop the lands at the Navan IDA site also applies to the IDA Business and Technology Park in Drogheda. ED OBJ 5 of the Meath CDP places on the Council the objective:

“To explore joint ventures with developers/industrialists/landowners to develop strategic sites in designated economic growth areas/centres consistent with the Regional Planning Guidelines for the Greater Dublin Area. The fast-tracking of statutory planning consents shall be facilitated and encouraged which may include the use of appropriate statutory instruments, to include, inter alia, Part VIII planning consent for site development works or indeed for the entire development, preparation of Motorway Orders, etc. This process should include the reservation of prize sites which would be suitable for or comparable to the IDA “strategic sites” which could support investment from large Foreign Direct Investment (FDI) firms which may have significant space requirements”.

The second site examined by the consultancy team in Navan is that at Knockumber, which is currently zoned E2 and earmarked for product-intensive activities (within the current Navan Development Plan 2009-2015, which describes E2 lands as seeking to provide for the creation and production of enterprise and facilitate opportunities for industrial, manufacturing, distribution, warehousing and other general employment/enterprise uses in a good quality physical environment). The site is located adjacent to the M3 Motorway and also benefits from proximity to Navan Town Centre and an extensive residential catchment. However, public transport connections serving the area are limited. The Mullaghboy Industrial Estate on the lands currently accommodates a range of product-intensive uses and in February 2013 ABP granted planning permission for the development of a maintenance facility to service the M3 and the adjoining road network incorporating direct access from the N51 Athboy Road on the northern portion of the site at Knockumber. Given the existing connection of the site to the M3, the site has the characteristics to accommodate product-intensive uses in accordance with the established uses at Mullaghboy Industrial Estate and the enterprise and employment zoning objectives pertaining to the site. The northern part of the site, lying adjacent to the N51, is also subject to Objective MP7 which requires the preparation of a masterplan to be prepared for the lands (which, under the local development plan, will require the illustration of the overall block layout and road layout for the lands in their entirety and the phasing of development proposed). A linear tract of land has also been identified at Knockumber to specifically provide for small and medium sized industries of a local nature (including entrepreneurial start-up businesses) and will allow for the displacement of non-compatible and industrial uses from the town centre and other locations.

Given the existing connection of the Knockumber site to the M3, its proximity to the town centre and an extensive residential catchment, we consider that the site has the characteristics to accommodate product-intensive uses in accordance with the established uses at Mullaghboy Industrial Estate and the enterprise and employment zoning objectives pertaining to the site (even though public transport connections serving the area are limited, this should not detract significantly from its envisaged product-intensity).

Regarding the **possibility of a regional hospital** in Navan, we have had regard to a number of studies dating back almost a decade, among which are the Health Partnership report of 2008, which recommended Navan as the preferred location for the regional hospital, and the report by RPS a year later, which considered alternative sites within Navan.

The proposed development of a new regional (acute) hospital for the NE arose from the publication of a report by Teamwork Management Services Limited, entitled 'Improving Safety and Achieving Better Standards – An Action Plan for Health Services in the North East' published in June 2006. The Teamwork report recommended the following three-stranded action plan designed to improve health service safety and standards in the NE Region:

- The development of local services, with the existing five hospitals and primary and community care providers playing central roles;
- The development of a new regional acute hospital; and
- Binding these local and regional services together through a series of clinical networks, centred on the needs of patients.

The Teamwork report recommended that the North East should have one regional public hospital based on international best practice for a catchment population of between 300,000 and 500,000 people.

The Health Partnership report was published in 2008. This was based on a multi-criteria analysis (MCA) to assess the appropriateness of a number of locations within the NE Region for the regional hospital and this entailed scoring each location against a set of criteria and aggregating the scores per location using weights attached to the scores. The Health Partnership report selected Navan on the basis of the MCA.¹⁹⁶ The reasons for the decision in favour of Navan were summarised as follows:

- It is located in the highly populated south of the region;
- It demonstrates good road access to other parts of the region *via* the M3/N3 to Kells, Cavan and Dunshaughlin, *via* the N51 to Drogheda, the N51/N2 to Ardee, Carrickmacross, Ashbourne and Monaghan and the N51/M1 to Dundalk;
- It is best-placed to stem the flow of Meath patients to Dublin and secure the critical mass required for safe high quality healthcare services;
- New railway link (which has not occurred) and the completion of the M3 (the latter has come on stream but the former has not eventuated); and
- Attractions and amenities associated with a large town, Navan will be able to attract and retain the high calibre staff required to work at the new Regional Hospital.

The next report, by RPS, considered three sites in Navan for the hospital and came to the conclusion that the preferred site, *from a town planning perspective*, would be the site at Nevinstown. At the same time, however, the RPS report of January 2009 also concluded that (pp. i-ii):

“from the perspective of the HSE other issues including technical, financial and implementation matters will also need careful consideration, in order to confirm [Nevinstown] as the most appropriate location in all the circumstances. Should further investigation identify particular

¹⁹⁶ Two observations may be made on the Health Partnership report. One is that MCA (generally speaking) involves a degree of subjectivity regarding (a) the criteria (whoever chooses them and however they are selected) and (b) the weighting given to each criterion in the aggregation of each location. Secondly, in concluding in favour of Navan, the Health Partnership report refers to the proposed Navan-Dublin railway line as being a facility serving to attract and retain high calibre staff required to work at the new hospital (along with the M3).

difficulties with the development of [Nevinstown], then [the other sites considered – (1) Limekilnhill and (2) Balreask Old and Limekilnhill (part)] should also be similarly evaluated in the sequence specified in the order of preference set out above, until the most appropriate balance of all factors is achieved”.

The RPS report identified a number of issues concerning the preferred site and the two other sites:

- Regarding the Nevinstown site;
 - Poor access that would require new link roads to alleviate
 - Investment in public transport modes to and from the site
 - The site was found to be outside of the boundary for development of Navan and would require enlargement of the Development Boundary as well as re-zoning
- In respect of Balreask Old and Limekilnhill (part);
 - Very large site (62.3 ha) deemed to be significantly above the maximum 20 hectares required for hospital development and future expansion
 - Generally positive access
- Turning to Limekilnhill;
 - Site in size terms is slightly above the maximum 20 hectares required for hospital development and future expansion (thus of a reasonable fit in size terms)
 - Protected structures at the site and land-use zonings render the site “uncertain” for the possible hospital development.

Ironically enough, the absence of any clear-cut conclusions in the RPS study means uncertainty today, as in 2009 at the time of the RPS report, regarding the preferred location of the possible regional hospital within Navan.

Objective INF OBJ 31 of the Navan Development Plan 2009-2015 includes an objective to prepare, in consultation with Bus Éireann and the NTA, a local bus strategy for the town with particular emphasis on linkages to the proposed rail/bus stations and proposed regional hospital site (at Nevinstown). The lands are also subject to a specific objective to prepare a framework plan (Framework Plan 1), namely relating to lands off the Rathaldron Road at Nevinstown identified for community, high natural beauty and WL zoning objectives. This area is intended primarily for community facilities to provide for the proposed new regional hospital and ancillary healthcare uses.

From our research work and consultations, the proposed regional hospital in Navan is both extremely complex and likely to be a highly sensitive, and likely exceptionally contentious, issue. The complexity of the possible development is plain to see in the reports that have been completed, where no clear-cut conclusions regarding the site for the hospital have been made (even the MCA contained in the Health Partnership report may be open to question and criticism) and the RPS study is limited to taking a town planning perspective and does not consider other key issues such as technical and financial/implementation matters, which would need very careful consideration by the HSE.

Nevertheless, the current Meath CDP (as varied) does make provision for supporting and facilitating the development of a new regional hospital in Navan. In particular, it is the policy of Meath County Council and Navan Town Council “To facilitate the Health Service Executive-Dublin North East in the provision of a new Regional Hospital in Navan” (SOC POL 5) and it is an objective of Meath County Council and Navan Town Council “To investigate and reserve in consultation with the Health Service Executive-Dublin North East a suitable site for a Regional Hospital in Navan (possible suitable locations include Nevinstown, Limekilnhill and Balreask Old & Limekilnhill (part))” (SOC OBJ 3). Furthermore, under ECON DEV OBJ 6:

“Navan Town Council and Meath County Council shall facilitate the Health Service Executive and the Department of Health in the provision of a new Regional Hospital in Navan. Navan Town Council and Meath County Council have indicated lands within Framework Plan 1 as their preferred location to develop the new Regional Hospital and have indicated it as one of the most important potential economic stimulants for this town and region building on the high level economic objective contained in the Meath County Development Plan 2013-2019”.

Be that as it may be, and assuming that Navan is the most appropriate location for a new NE regional hospital, and that there are sufficient zoned lands to accommodate the development from a planning perspective, there remain the major issues of financing the development (public or private or a mix of the two) and its technical features from a health/patient perspective. To date, in Ireland, private hospital provision has been largely confined to Dublin and we would doubt the feasibility of such a development outside the capital in a relatively small urban centre like Navan (private hospitals in other parts of the country – for example, the Galway Clinic – tend to serve niche segments of the market).

In view of the national fiscal situation over the medium term (to 2020, at least) and taking account of the foregoing reports, which are inconclusive and ambiguous, we doubt whether it would be feasible and justifiable for Meath County Council, in the absence of further direction from relevant external national stakeholders, to invest valuable time and energy into further consideration of the possibility at this time – helping to facilitate more enterprise and employment development among indigenous and FDI firms represents, in our view, a more productive use of resources.

Centre within the M3 Corridor: Kells and Environs

The town of Kells can justifiably lay claim to being the main economic development centre in the north of County Meath, serving a wide hinterland and possessing a number of important features.

As well as being a Moderate Sustainable Growth Town in the RPGs for the GDA 2010-2022 and the Meath CDP 2013-2019, Kells is also a designated heritage town. It is situated in the north-west of the county at the junction of the M3/N3 (Dublin-Cavan-Donegal National Primary Route) and the N52 National Secondary Route (Dundalk-Mullingar). It is located 64km north-west of Dublin, 15km north-west of Navan and 50 km east of Cavan.

Kells has excellent accessibility by car, being served by the M3/N3 network, which connects with Dublin to the south-east and Cavan to the north. This national road network also serves Navan, Dunshaughlin, Virginia and Cavan. The town is also accessible by bus, with Bus Éireann operating a number of services through Kells, notably the service between Dublin and Cavan, which also serves Navan and Dunshaughlin.

An important recent development for Kells in the context of this report concerns its inclusion as one of the additional Assisted Areas in the new Regional Aid Map for Europe 2014-2020. This significant new opportunity extends across the former Kells Electoral Area, covering approximately 29,000 people and including the towns of Oldcastle, Athboy and Nobber as well as smaller settlement areas in the area.¹⁹⁷ The new designation will mean the availability of enhanced grant support for SMEs and large firms, and an important new investment in the area has recently been announced.¹⁹⁸

¹⁹⁷ See the earlier Figure 5.1 (p. 71), Figure 7.8 (p. 141) and Table 7.10 (p. 142), and the discussion around them.

¹⁹⁸ As outlined earlier in Box 7.2 (p. 143).

There may also be an opportunity to explore piloting the proposal, in the CEDRA report – *supra* footnote 132) of a Rural Economic Development Zone (REDZ) in the Kells area (tying-in with the restructured LEADER programme and integrated development of rural towns and their hinterlands, Box 2.1, p. 14).

Sites within the Kells and Environs Centre on the M3 Corridor

Kells Business Park is currently zoned for E2 General Enterprise and Employment (people- and product-intensive activities) in the Kells Development Plan 2013-2019. This park includes a variety of industrial, warehouse, wholesale, distribution and service companies and is generally fulfilling its functions, based on our discussions with stakeholders consulted during the study and our own research. Having regard to the established uses on the site, its connection to an extensive residential catchment in Kells and environs, and to the national road network, future employment uses have potential to accommodate a mix of both product- and people-intensive uses.

Access and connection to services are well-established within the Kells Business Park and it is considered that such connections can be extended to serve the greenfield lands within the site. There are no apparent significant barriers to the development of these lands within the timeframe between now and the end of the decade.

It is important that pro-active promotion of the new EU Assisted Areas designation of the area takes place – with Meath County Council working in partnership with Kells Chamber of Commerce and other business interests/groups in the eligible area to ensure that all entrepreneurs and businesses are fully and properly informed of the existence and significance of the important new designation and how to go about accessing the new supports if required.

In addition to Kells Business Park, we believe that Meath County Council should consider other employment use lands in the eligible area – to cater for a probable increase in demand in light of the new designation, including from potential FDI firms.

M1 Corridor

Centre within the M1 Corridor: Drogheda and Environs

East Meath is located on the M1 Motorway which connects directly to Dublin City, Dublin Airport and Dublin Port and through the M50 with the national motorway network. The area is served by 3 junctions on the M1 as follows:

- Junction 7: City North/Stamullen/Gormanston;
- Junction 8: Duleek/Julianstown;
- Junction 9: Drogheda Environs/Donore .

Central to this part of the county is Drogheda and Environs in Meath. Drogheda overall (Louth and Meath parts) is jointly with Dundalk the largest town in Ireland and comes next to Waterford in the list of cities/towns by population. The immediate population of Drogheda is about 35,000 but when the environs in both the Meath and Louth parts are factored in, the wider population is well over 60,000.¹⁹⁹

Drogheda is the most multi-modal of all the settlements in Meath (having one of the busiest railway lines in the country as well as its connections to the M1 Motorway, national primary roads and its possession of Drogheda Port Company and proximity to Dublin Airport and Dublin Port. Its favourable

¹⁹⁹ For the purposes of our outline here, we group the sites in Stamullen and Gormanstown under Drogheda and Environs. This is consistent with the 'study area' delineated in the Indecon economic strategy for Drogheda and its environs (2009), which included these settlements in eastern Meath.

location and excellent transport infrastructure has seen the population of the town expand rapidly since 2001, with settlements in east Meath, like Mornington-Bettystown-Laytown, Julianstown and Stamullen, mushrooming in the past decade.

Accordingly, the extent of outward commuting is high in the area, with well over 15,000 outbound commuters from the Louth and Meath parts of the town and its environs, many of whom live in the Meath parts. Most of the commuters work in Dublin. Access to skills is therefore an important consideration in the goal of retaining more economic impact locally.

However, like Navan, Drogheda is not large in terms of FDI: currently Drogheda and Environs in Meath is host to two FDI companies – State Street International Funds Services (IFS) and Coca-Cola International Services. Both companies contribute high value employment locally and are very well regarded, based on our consultations with stakeholders. However, like Navan and elsewhere in Meath, it is felt strongly that Drogheda could do with even more employers of this type. In our view, the skills and transport infrastructure are in abundance locally for such employment and the existing companies demonstrate the area's capacity to accommodate high quality inward investment.

Sites within the Drogheda and Environs Centre on the M1 Corridor

The latter FDI firm – State Street IFS – is the only tenant in the **IDA Business and Technology Park on the Donore Road in Drogheda**. Like its counterpart in Navan, this facility is not functioning as originally intended and the single tenancy has remained the case since 2006, when State Street IFS entered the park (into an advance building, illustrating the importance of property solutions in the FDI process). Given the absence of any further investment since then, like its counterpart in Navan, a proactive solution involving promoting the site in various ways, through the IDA and other channels, needs to be undertaken as soon as possible.

A number of other sites in Drogheda and environs have been considered by the consultancy team and our assessment of them is summarised as follows:

- **Lands adjoining (to the east of) the R152 in Drogheda** – currently zoned E2 (east of the R152) and E2-E3 (to the west of the R152) affording good proximity to the M1 plus availability of skills, existing employers (e.g. Boyne Valley foods), which would be appropriate for further E2-E3 usage;
- **Lands at Mill Road/Colpe Cross** – currently zoned as WL but well-located in terms of access to the M1, skills (large residential catchment nearby) and close to the Coca-Cola facility and a change in the WL designation may be justified in the event of potential employer/FDI interest (subject to a possible framework plan to account for access and transport, *inter alia*);
- **Stamullen site** – currently zoned E1-E2 and, subject to framework plan to consider access, potential for product-intensive activities;
- **Gormanston site** – currently zoned WL but may be re-considered in the lifetime of the Meath CDP in the event that the proposed deepwater port located close to the site at Bremore (under the auspices of Fingal County Council) proceeds (which remains possible under the National Ports Policy of March 2013).

M2 Corridor

Centre within the M2 Corridor: Ashbourne

Ashbourne is favourably located approximately 20km north of Dublin and bypassed by the M2/N2 route linking Dublin to Derry/Londonderry. The R135 runs through the town centre. The town is approximately 29km south of Navan. It is the second largest town in Meath and consequently the second largest retail

centre after Navan. Like nearby Rataoth and Dunshaughlin, it has grown rapidly in recent years, and it is relevant to think of these towns, and smaller settlements within them, as part of the wider area.

It is estimated that Ashbourne has a wider population of approximately 1.5 million people within a catchment area of a 45-minute drive time. It is thus expected that enterprise and employment will continue to expand to meet the requirements of the population of the town and adjoining areas. The creation of a new town centre and streetscapes has also added to the town's features as a prime and attractive location to live and work

The consultancy team would emphasise that Ashbourne's development over the medium-term should be more balanced in terms of *both* enterprise/employment *and* people/residential as opposed to the largely residential-dominated development of the past. As elsewhere in the county, it will be important that Meath County Council works constructively, and flexibly, with wealth creators and enterprise in the area to ensure greater jobs growth locally, to help arrest the inexorable rise in outbound commuting from this part of the county.

The primary focus of enterprise and employment uses in Ashbourne has been to the north of the town, initially on the Ballybin Road (Ashbourne Industrial Estate) and more recently towards the Rath roundabout (where the sites outlined below are located). To the north of the town, on the N2 Dublin-Derry/Londonderry route lies Tayto Park, which has grown very rapidly to become one of the largest visitor attractions in the country. The initiative has been a tremendous success for the area and has the potential to grow further, according to our consultations with local stakeholders.²⁰⁰

Sites within the Ashbourne Centre on the M2 Corridor

Lands considered comprise Ashbourne Business Park and lands to the north of that, occupying 47.4 hectares and 30.46 hectares respectively (product-intensive and people-intensive lands respectively). The lands concerned are currently zoned E2 General Enterprise and Employment in the Meath CDP 2013-2019 (as varied).

The **Ashbourne Business Park** lands are subject to a Specific Objective Framework Plan (FP OBJ 2, Volume 5 of the Meath CDP 2013-2019 as varied), which provides that:

"This Framework Plan relates to lands at Ashbourne Business Park extending to 47.4 hectares in area. It is intended that these lands shall provide for light industrial and industrial office type employment in a high quality campus environment. The Framework Plan for these lands shall include, inter alia:

- A comprehensive landscaping scheme;
- Details of overall site and building layout;
- Provision of adequate public lighting and footpaths throughout the lands;
- High quality design, finish and layout;
- Infrastructural and services requirements including access for vehicles, pedestrians, cyclists and people with disabilities, car parking and vehicle turning;
- Access via the existing entrance off the L5018 or utilising existing access points onto the national road network. Access arrangements shall be determined as part of the Framework Plan;
- Provision of a civic amenity facility, and;

²⁰⁰ See the earlier Table 7.34 (p. 161) and the description of that table.

- Provision of a machinery/storage depot of approximately 0.5 hectares/1 acre (objective ECON DEV OBJ 10 of Ashbourne Local Area Plan refers)".

The **lands to the north of the business park** are subject to FP OBJ 3 (Volume 5 of the current Meath CDP, as varied) which outlines the following (our italics and abridged quote):

"This Framework Plan relates to lands off the N2 and L5018 to the northwest of the Ashbourne Business Park. These lands extend to 30.46ha in area ... A Framework Plan has been prepared by the Planning Authority in relation to these lands. Any development within this area shall generally accord with the agreed Framework Plan ... The Framework Plan 2 lands are identified with an E2, 'General Enterprise & Employment' (Category 1) land use zoning objective. However, these lands represent a unique opportunity as an extremely well serviced site within the fringe of South Meath and Metropolitan Dublin. The site is well placed along the route of the main Eirgrid east/west inter-connector between Woodland, Co. Meath and Deeside (UK) which offers great opportunities for enterprises that require guaranteed delivery of power. Furthermore, the site is bisected by both the Aurora Telcom National Network and An Bord Gáis pipeline providing excellent fibre based broadband and power connections. The local zoning objective set down for these lands is as follows: 'To provide for the development of data centre facilities and associated related industries set in open parkland with extensive landscaping, a high architectural standard of layout and building design' ... A data centre is [generally] a facility used to house computer systems and associated components, such as telecommunications and storage systems. It generally includes redundant or backup power supplies, redundant data communications connections, environmental controls (e.g. air conditioning, fire suppression) and security devices. Any revisions to the Framework Plan shall require the prior written agreement of the Planning Authority".

The lands in both instances have the potential for further development and employment generation in Ashbourne and environs. In particular, in accordance with the established uses at the Ashbourne Business Park and its connection to the national road network, it is envisaged that the lands off the N2 will continue to develop as a product-intensive site, with opportunities for E2 employment generation, including industrial, manufacturing, distribution, warehousing and other general employment/enterprise activities in a good quality physical environment. The future development of the lands to the north west of the Ashbourne Business Park have potential to accommodate a data centre development in accordance with specific objective FP OBJ 3 of the Meath CDP having regard to the infrastructural connections serving the site. Such employment uses are considered to be both people- and product-intensive and we would assess such investment as being foreign-owned or indigenous (i.e. possibility of FDI in those lands). A Framework Plan prepared for this possibility was prepared for Meath County Council in May 2013, which sets out a vision for these lands and the possibility of a data centre.

We have also considered additional lands at **Ninemilestone Interchange** to the south of Ashbourne. The site is currently undeveloped and unzoned but nevertheless is a large (c. 100 acres, single landowner – we understand) and strategically located with the airport road adjacent. Servicing may be an issue (including broadband provision) and it is understood that the interchange in question is one of the junctions in Meath deemed to be 'exceptional' (i.e. transport only) by the NRA. Any development of the site will rest on servicing, including broadband, and the aforementioned interchange issue. In the event that the site is developed, it could be as a logistics park, given its location on the Dublin side of town.

M4 Corridor

Centre within the M4 Corridor: Maynooth and Environs

The Maynooth Environs lands within the administrative boundary of Meath County Council are located approximately 1.5km north-east of the town of Maynooth, Co. Kildare. Maynooth is a designated growth centre (Large Growth Town II) in the RPGs for the GDA 2010-2022 and the Meath CDP 2013-2019 (as varied). It is a major university town, hosting one of the constituent colleges of the National University of Ireland (NUI) with a growing student and residential population with established rail and motorway links to Dublin and westwards. The area is well placed to take advantage of its proximity to the national roads network and Dublin Airport as well as national rail network.

Sites within the Maynooth and Environs Centre on the M4 Corridor

We have considered two (2) sites in this centre and a summary of our assessment is as follows:

- **Carton Demense lands** (to the east of the R157) – currently zoned for the possibility of E1 employment but there are constraints due to closeness with Carton Demense;
- **Enfield;**
 - **Enfield Industrial Estate and Enfield Business Park** – currently E2, existing tenants and good transport connectivity with no apparent issues (product-intensive activities)
 - **Lands to the west of Enfield along the R148 Dublin Road** – currently zoned E2 but greenfield site and undeveloped, meaning that a framework plan would be required (product-intensive activities)
 - **Privately owned lands** – currently WL zoning (subject to framework) but pluses in the form of single landowner, good transport access and would suit people and/or product-intensive usage.

Summary of the Features of the Sites and their Potential Employment Uses

A summary of the features of the identified sites is shown overleaf in Table 8.15. This includes a statement of potential activities on the sites (the notes at the bottom of the table clarify what is meant by the different types of activity). By-and-large, product-intensive activities are associated with manufacturing (with high-tech manufacturing generally entailing more employment and higher educational attainment than traditional and/or light manufacturing/industrial/warehousing); while people-intensive activities tend to be associated with office/services, which may be high-end/internationally-traded services or domestically/locally-traded services (with relatively high educational attainment and skills in both cases). Indication in the final column is also given to the potential for FDI and indigenous employment.

Most of the sites are at this point in time undeveloped lands and the absence of property or buildings in planning may be viewed less positively from an inward investment perspective. Clearly, therefore, there is a lot of work to be done in terms of delivering the sites for employment usage. Nevertheless, given their attributes and occurrence in respect of the economic hierarchy of centres as provided for in the Meath CDP (as varied), they should nevertheless be promoted at the earliest possible opportunity, with the aim of generating interest, inquiries, site visits and ultimately investment.

In addition to the lands outlined above, and as hinted at in the earlier Box 8.1 (p. 197), the town centres should also be promoted as key locations for employment generating activities. Town centre

opportunity sites are identified within the Meath County Retail Strategy and such sites are considered to be equally relevant for the economic strategy.

Table 8.15: Summary of the Features and Potential Employment Uses of the Identified Sites in County Meath

Corridor	Economic Centre	Site	Current Zoning and Potential Land Uses					Potential Activities (FDI and/or indigenous employment)
			E1 - High Technology	E2 - General Enterprise & Employment			E3 - Warehousing & Distribution	
				Category 1	Category 2	Category 3		
M3	Dunboyne	Pace	✓					People-intensive; high-end office/services (FDI/indigenous)
		Portan, Clonee		✓	✓	✓	✓	Product-based; light industrial/manufacturing/warehousing (indigenous)
		Bracelawn		✓	✓	✓	✓	Product-based; light industrial/manufacturing/warehousing (indigenous)
	Navan	IDA Business and Technology Park	✓					People-intensive; high-end office/services and high-tech manufacturing (FDI)
		Knockumber		✓	✓	✓		Product-based; light industrial/manufacturing/warehousing and start-ups (indigenous)
		Possible Regional Hospital Sites						
		Nevinstown	Identified sites in respect of the proposed regional hospital for Navan - Nevinstown the preferred site from a town planning perspective but with access, public transport and boundary planning issues					People-intensive; hospital and ancillary services - proposed regional hospital would provide significant public sector employment with potential to transform local economy
		Balreask Old & Limekilnhill (part)						
		Limekilnhill						
	Kells	Kells Business Park	✓	✓	✓	✓		People/product-intensive; variety of manufacturing and services (FDI/indigenous)
		Others possible lands in the eligible area		✓	✓	✓		People/product-intensive; variety of manufacturing and services (FDI/indigenous)
M1	Drogeda and Environs	IDA Business and Technology Park	✓					People-intensive; high-end office/services and high-tech manufacturing (FDI)
		Lands on the R152		✓	✓	✓	✓	People/product-intensive; variety of industrial, warehousing and services (FDI/indigenous)
		Mill Road/Colpe Cross lands	Currently zoned as White Land but may change in the event of potential employment					People-intensive; high-end office/services (FDI/indigenous)
		Stamullen	✓	✓	✓	✓		Product-based; light industrial/manufacturing/warehousing (indigenous)
		Gormansbwn		✓	✓	✓	✓	Dependent on development of Bremore Port (Fingal) (in the context of the NPP)
M2	Ashbourne	Ashbourne Business Park		✓	✓	✓		Product-based; light industrial/manufacturing/warehousing (indigenous)
		Lands to north of Ash Bus Park	✓	✓	✓	✓		People-intensive; office/services and/or data centre (FDI/indigenous)
		Ninemilestone		Unzoned and undeveloped site				Dependent on possible Meath County Council acquisition, and services availability
M4	Maynooth Environs	Carlton lands	✓					High-end office/services and manufacturing (FDI)
		Enfield Industrial Estate/Business Park		✓	✓	✓		Product-based; light industrial/manufacturing/warehousing (indigenous)
		Enfield lands along the R148 Dublin Rd		✓	✓	✓		Product-based; light industrial/manufacturing/warehousing (indigenous)
		Privately-owned lands (Enfield)	Currently zoned as White Land but may change in the event of potential employment					People/product-intensive; offices and/or manufacturing/industrial (FDI/indigenous)

Source: Consultancy team review and analysis.

Note: 'High-end office/services' include software (consultancy, multi-media, games development, music technology, broadcasting and publishing), international financial services (mainly funds/insurance/pensions administration) and international business services (customer services, global/EMEA operations); 'office/services' include domestically/locally-traded services (professions, finance, insurance etc.) and public administration (education, health); 'high-tech manufacturing' includes med-tech, life sciences, green and clean-tech; and 'light industrial/manufacturing/warehousing' includes food and drink, engineering, fabrication, transport/logistics.

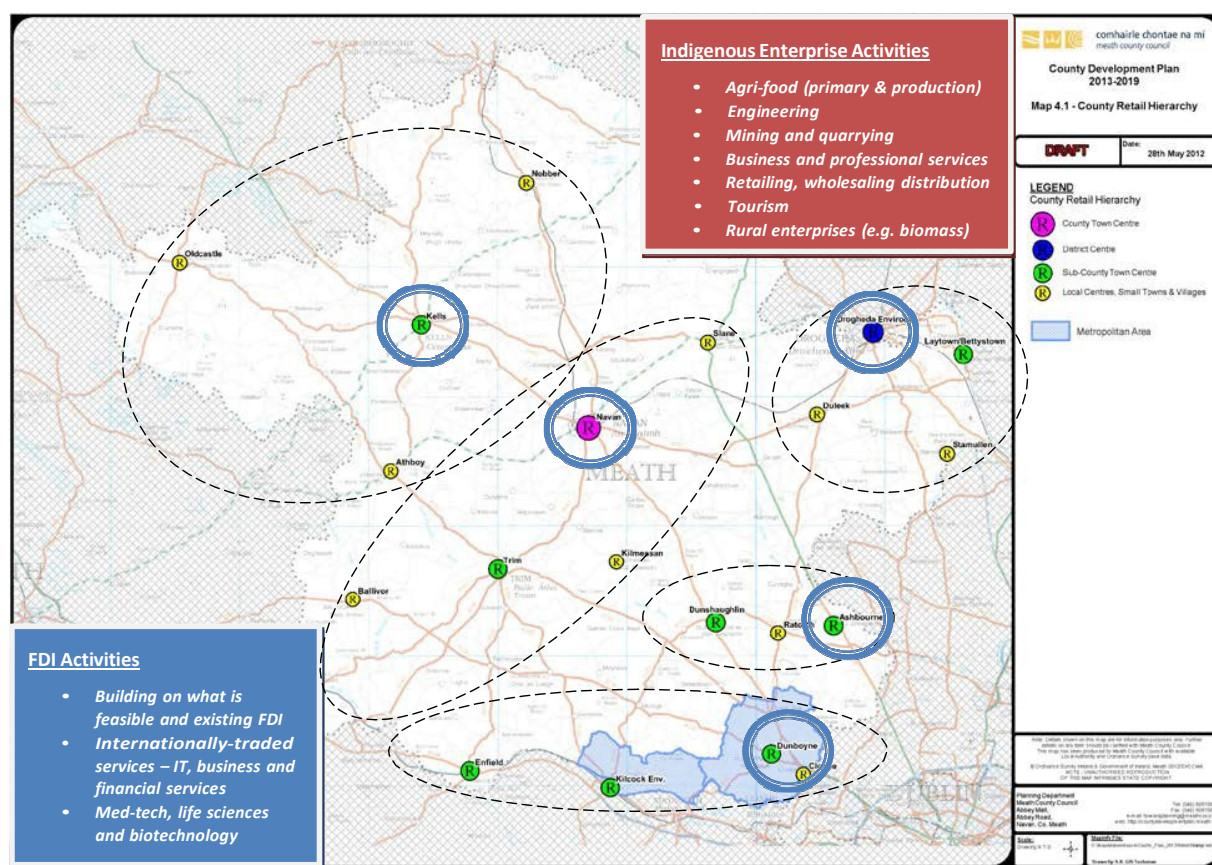
Mapping of the Spatial Dimension of the Economic Vision for Meath

The map below illustrates the spatial dimension of the Economic Vision for Meath (2022) by bringing together the foregoing assessment of the sites around the county and the sectors/economic activities that can be developed in Meath. It is consistent with the economic hierarchy in the CDP (as varied).

Shown in the map (dotted rings) are the areas in which the sites occur and the circled urban centres will act as the focal points of the wider catchment areas, with the other settlements within the areas benefitting in the process and ultimately the county as a whole.

The principal towns and their attendant settlement areas are currently host to a range of activities, including professional and skilled service provisions, comparison and convenience retailing, banking, administration, health and education, and housing. It is appropriate that they will provide the focal points for FDI and indigenous industry development, with the rest of the county benefiting accordingly.

Figure 8.4: Illustration of the Spatial Dimension of the Economic Vision for Meath



Source and note: See Table 8.15 for further details regarding certain of the economic activities.

Comments on the Delivery of the Sites

Introduction

Following on from the identification and assessment of the strategic sites, this part of the spatial planning considers a number of issues impacting on the delivery of these sites, namely:

- Certainty/flexibility in the planning process;
- Availability of infrastructure and facilities;
- Land ownership;
- Attracting investors; and
- Development contributions.

Certainty/Flexibility in the Planning Process

Potential inward investors to a location generally tend to have tight timescales for the delivery of sites. The planning application process, and the third-party appeal process specifically, tends to result in a higher degree of planning risk, which in turn can have implications for both the timescale and outcome of planning applications.

Furthermore, requirements for additional studies such as framework plans and area plans, which can be a valuable source of information for landowners and investors, can often add significant delays to the application process. In many instances, where the onus is on local authorities to prepare such documents, and such plans are not in place, a development can be deemed premature pending the publication of such a plan.

On this basis, it is recommended that consideration be given to the provision of a more flexible planning framework to assist in the delivery of key strategic employment sites in order to provide more certainty in the planning process.

Availability of Infrastructure and Facilities

The availability of certain infrastructure and connections to services are key considerations for the delivery of any site. It is recommended that an audit of each of the identified sites is undertaken to assess its potential for connection to necessary infrastructure as detailed in the matrix presented in Table 8.16 below.

Table 8.16: Illustrative Matrix for Assessment of the Delivery of the Sites in Meath

			Site Assessment Criteria									
Corridor	Economic Centre	Site	Vehicular Access	Connection to National Road Network	Public Transport	Water	Surface Water Drainage	Foul Drainage	High Voltage Electricity	Gas	High-Speed Broadband	
M3	Dunboyne	Pace										
		Portan, Clonee										
		Bracelawn										
	Navan	IDA Park										
		Knockumber										
		Possible Regional Hospital Sites										
		Nevinstown										
		Balreask Old & Limekilnhill (part)										
	Limekilnhill											
	Kells	Kells Business Park										
		Previously de-zoned Kells lands										
	M1	Drogheda and Environs	IDA Park									
Lands on the R152												
Mill Road/Colpe Cross lands												
Slamullen												
Gormansbwn												
M2	Ashbourne	Ashbourne Business Park										
		Lands to north of Ash Bus Park										
		Ninemilestone										
M4	Maynooth Environs	Carbon lands										
		Enfield Industrial Estate/Business Park										
		Enfield lands along the R148 Dublin Rd										
		Privately-owned lands										

Source: Consultancy team review and analysis.

Note: Suggested key to filling-in the table – ✓ (Already provided); PC (Available to connect); X (Constraints); and TBC (To be confirmed).

A list of all infrastructural deliverables for each site should be identified based on a review of the above matrix.

Where the development of a site is premature pending the provision of key infrastructure, it is recommended that Meath County Council adopt a proactive approach to facilitate the delivery of such infrastructure requirements to remove any potential risks in the planning process (through the Part VIII process).

A review of the planning policy framework pertaining to the sites outlined earlier has identified that certain access constraints have led to delays in the delivery of the sites. Planning permission for economic format development at Portan/Clonee, for example, was previously refused due to the inadequate capacity of the access road to cater for the proposed development. Meath County Council should encourage and facilitate necessary access connections where necessary.

Also provided for in the proposed matrix of criteria above is the availability of high-speed broadband, which tends to be an issue in rural or less densely populated areas. Stakeholders that we have consulted during the study have highlighted the lack of such service in their parts of the county and this important requirement needs to be addressed as a matter of priority (in the context of renewed attempts by the new Cabinet to deal with the problem in less densely populated parts of the country under the National Broadband Plan).

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 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.

Attracting Investors

Measures for attracting investors to the county are detailed within the Actions proposed in Section 9. In support of this, it is considered that Meath County Council should prepare a *sites marketing document* for the development of key employment sites. The document would seek to package the qualities of the sites to potential investors (and to the IDA) and would include, *inter alia*:

- Site location and description;
- Land ownership pattern;
- Archaeological/heritage considerations;
- Access and parking;
- Connection to transport routes and essential services;
- Type of economic development considered appropriate – given local skills etc.;
- Provisional 3D massing and block plans clearly indicating the sites development potential.

Essentially the objective is to ‘package’ the sites for potential investors interested in locating in the county. The sites marketing document should be proactive and ensure that commercial realities are considered. Meath County Council should promote site assembly where required in order to facilitate development, particularly where there are multiple site owners.

Development Contributions

In order to encourage and promote economic development within the county, Meath County Council may consider an offset for employment generating developments within the Section 48 Contributions Scheme.

Section 48 contributions are applied throughout the county to developments that receive planning permission and are paid on foot of commencement of development (there are some types of development that are exempt from such contributions for various reasons, including the size and nature of the development). These contributions are used to meet the costs of infrastructural investments and various facilities throughout the county. In order to incentivise the employment sites identified within this report, the levy scheme could give consideration to differentiating between commercial land use types. Differential rates of contributions could be identified based on development types (e.g. lower for industrial and logistics formats of development to promote economic development).

Consideration could also be given to the application of the contributions payable under the Section 49 Development Supplementary Contribution Scheme for the county through consultation between Meath County Council and the RPA. For example, under Phase 1 of the proposed Navan-Dublin Rail Line (Clonsilla-to-Dunboyne), the amounts of the contribution to be paid under this scheme (January 2006 prices) were as follows:

- Residential – €144,700 per gross hectare; and
- Commercial – €329,900 per gross hectare.

The Development Contribution Guidelines refer to the potential for development contribution schemes to target growth to specific development types. As a mechanism to promote economic development, the levy scheme could consider differentiating between commercial land uses (for instance, incentivising industrial and logistics formats to promote economic development).

The Development Contributions Guidelines also afford reduced rates or waivers for IDA/Enterprise Ireland-supported developments and lower rates for town centres to support town centre development. Such provisions should be utilised and enacted to encourage economic development within the county.

The recently published Planning and Development (no. 1) Amendment Bill 2014 more specifically allows for a revision to development contribution rates as incentives for specific sites:

“(2) Where the relevant plan and/or scheme indicates objectives for securing the redevelopment and or reuse of vacant or underutilised sites, the relevant development contribution schemes and/or any supplementary development contribution schemes may make provision for the payment of a reduced rate of contribution in respect of the redevelopment and/or material change of use of such site, where, in the opinion of the relevant planning authority, such site will avail of existing infrastructure and thereby encourage the redevelopment and/or reuse concerned”.

We believe that this provision should be utilised and enacted within the Meath County Council Development Contribution Scheme and Supplementary Development Contribution Schemes.

Rates

Another potential instrument in respect of incentives aimed at delivering the sites concerns the possibility of part of the rate base for an employment fund for the identified sites or sites in which a potential investor is interested. The fund could provide the opportunity for investing in additional necessary infrastructure, supporting public-private-partnerships (PPPs) for advance buildings on the sites etc.

In any event, Meath County Council should be constantly mindful of its levels of levies, charges and rates to businesses and employers from a competitiveness perspective vis-à-vis other local authorities and should be prepared to act in the event of a significant competitiveness deficit being identified. In this regard, the Council should regularly seek to assemble *independent* data, reviews and reports etc. of inter-local authority costs on a like-for-like basis.

Soft Measures

In addition to the above are the following:

- In regard to the action in which we believe that Meath County Council needs to engage more proactively with the IDA, the Council should identify a liaison person on its side, with sufficient capacity and authority, to work with the agency on ongoing basis (that person within the Council should be the IDA's first port of call in respect of any inquiries or site visits from potential investors and the person can then act and liaison accordingly with the personnel within the Council to progress the potential investment);
- There should be a more structured relationship between Meath County Council and businesses (e.g. advice on services, compliance and best practices in other locations) and Meath LEO should be central in the process.

Additional Comments on the Current Meath CDP (As Varied)

In addition to the above, a review of the economic policies and zoning objectives of the Meath CDP 2013-2019 (as varied) was undertaken to identify any measures which could be revised to ensure the active promotion of economic development within the county.

Overall, it is considered that the economic components of the CDP strategy set out a strong basis to support economic development in Meath.

In particular, the policies and objectives within the CDP highlighting interaction with national development agencies to maximise job creation opportunities are important. However, such policies need to be implemented through active engagement with these bodies, which will be another one of our recommendations in Section 9.

A review of the economic development policies set out in the Louth, Kildare and Fingal County development plans was also undertaken and compared against the policies and objectives set out within the Meath CDP. We consider that the economic development policies of the Meath CDP compare well with these plans – at least in principle (but ultimately, and generally speaking, it is the practical application of the policies and objectives that decides which local authority areas perform well economically).

Employment Objectives – E1-E3

A statement could be included within the Meath CDP that the employment uses (E1-E3) are particularly appropriate for each employment zoning category but that all employment generating uses are ‘open for consideration’ under each zoning objective to facilitate greater flexibility and delivery in sites (the Council would at the same time, understandably enough, wish to guard against incongruous economic activities in a given site – owing to the objective of fostering clusters of activities that create positive externalities for those involved). This is part of the process of ensuring flexibility in planning for economic development and employment in sites in Meath in the coming years.

Clarity on the E2 Zoning Objective

The E2 zoning objective identifies the nature of E2 format development which would be appropriate within each centre. As outlined earlier in this section, three categories of E2 centre are identified within the Meath CDP, viz.:

- *Category 1* centres are identified as the “Primary and Secondary Economic Centres as provided for in Core Strategy (Navan, Drogheda, Dunboyne, Ashbourne, Kells)”;²⁰¹
- *Category 2* centres are identified as “Remaining Moderate Growth Towns as provided for in Core Strategy (Trim, Kilcock Environs, Dunshaughlin)”;²⁰² and
- *Category 3* centres are identified as “Lower-tiered settlements (Small Towns & Villages as provided for in Core Strategy)”.²⁰³

In accordance with the above classification, Clonee would be categorised as a Category 3 centre. The CDP sets out the following guidance for development of E2 zoned lands in Category 3 centres:²⁰⁴

²⁰¹ *Supra* footnote 187.

²⁰² *Supra* footnote 189.

²⁰³ *Supra* footnote 190.

²⁰⁴ *Supra* footnote 190.

“These centres should cater primarily for small scale enterprise and manufacturing which focus on incubator units, workshops, creative industries, small businesses, repairs, warehousing, distribution, open storage and transport operating centre type activities. The development of inappropriate uses such as office based industry and retailing will not be accommodated in lower tier centres. It shall be a requirement of an applicant to demonstrate the suitability of a proposed heavy industrial use within such land use zoning objective to Meath County Council”.

The identified lands at Clonee, which have a dual zoning for E2/E3 purposes, would therefore be subject to the above clause.

This is not in accordance with the guidance for the development of these lands as set out within the specific objective pertaining to the site (CER OBJ 2) which outlines that “any uses proposed shall have regard to and be consistent with the range of uses indicated as being appropriate to E2 “General Industry and Employment” Category 1 (Primary and Secondary Economic Centres) and E3 “Warehousing and Distribution” as provided for in Volume 1 of the County Development Plan”.

Phasing of Employment Zoned Lands

The appropriateness of phasing of employment zoned lands in some instances should be considered by Meath County Council. This phasing may currently act (inadvertently) as a barrier to the delivery of employment lands.

The Meath CDP (adopted Variation No. 2) identifies that lands zoned for Phase 2 employment purposes will only be made available for development when all Phase 1 lands have been developed. It is noted that the CDP identifies that, where significant development cannot be accommodated only within the Phase 1 lands, lands within Phase 2 may be considered.

However, it is considered that a choice of employment lands should be provided for potential investors within key settlements within the county. In some instances, Phase 2 zoned lands may be more appropriate for certain types of employment generating development than Phase 1 lands and may need to be available for development within a shorter timeframe.

In this regard, it is considered that the phasing objectives set out within the County Development Plan should be re-considered, particularly where they relate to separate employment zoned landholdings. This suggestion relates to the need for Meath County Council to ensure greater flexibility as part of the planning process in respect of economic development and job creation in the county.

Other Zoning Objectives

We would also draw attention to the following aspects of the Meath CDP:

- Other zoning objectives within the CDP could adopt a more flexible approach in terms of the range of employment generating uses listed as either “permitted in principle” or “open for consideration” – for example the following;
 - B1: Commercial/Town or Village Centre – the use Research and Development is not listed as either a use that is permitted or open for consideration
 - B2: Retail Warehouse Park – uses including Science and Technology-based enterprise, Industry Light, Enterprise Centre and Research and Development could be considered as “open for consideration” under this zoning objective
 - C1 Mixed Use – while uses such as Science and Technology-based enterprise and Industry Light are listed as “open for consideration”, the use Research and Development is not listed

- G1 Community Infrastructure – Enterprise centre not listed as “permitted” or “open for consideration”.
- Lands zoned as WL (White Land) should be made available by Meath County Council for appropriate employment generating uses in the instance that they become available for such development (for example, where an investor signals interest in generating employment on such lands, in tandem with the owner(s) of the land and/or with a property developer who would benefit from constructing the building to house the new development).

In addition to the above, a number of the identified sites considered in this report are subject to specific objectives within the Meath CDP. In many instances, these specific objectives identify the requirement for a framework plan to be prepared to guide the future development sites. However, the requirement for a framework plan for employment zoned lands may be considered an onerous requirement. In many instances, where the onus is on the local authority to prepare such documents, and such plans are not in place, a development can be deemed premature pending the publication of such a plan.

Finally, development management objectives are set out in Chapter 11 of the Meath CDP. The objectives in relation to parking provision, works of art and phasing are judged here as being inflexible and should instead seek to be more flexibly applied on a case-by-case basis.

Outputs of the Projected Level of Employment in 2022

The following projections of employment (total and by sector) in Meath in 2022 are based on bringing together the inputs outlined earlier, namely:

- The independent and official projections regarding employment growth in Ireland to the end of the decade (from the IMF, the Irish government’s MTES, the Department of Finance’s SPU and with reference to the ESRI MTR) – some assumptions have been necessarily made regarding the employment growth rates for the years 2021 and 2022 but these are in line with the independent projections;²⁰⁵
- The assessment of sectoral and sub-sectoral opportunities and growth prospects for Meath in the coming years;²⁰⁶
- The assessment of the strategic sites to accommodate an important part of the projected employment growth.²⁰⁷

In addition to the employment growth rates leading to higher employment in Meath in the coming years, another important input to the projections concerns sectoral change or shift in the employment share attributable to certain sectors.²⁰⁸ The key sector in this regard is the information and communication, financial, real estate, professional, administration and support service activities sector (as delineated in the CSO POWSCAR, 2011). This sector includes sub-sectors and activities relating to the modern knowledge-based economy – like ICT (software development), internationally-traded financial services (e.g. funds administration) and internationally-traded business services (e.g. global support

²⁰⁵ The independent projections together with the synthesised employment growth projections for Meath during 2012-2022 (remembering that the latest available fully factual position for the county is the last census year of 2011) were presented earlier in Table 8.6 (p. 179) and illustrated in Figure 8.2 (p. 180).

²⁰⁶ Based on the conceptual sectoral framework in Figure 8.3 (p. 183) and the assessments of sectoral and sub-sectoral prospects presented in Table 8.12 (p. 193), Table 8.13 (p. 194) and Table 8.14 (p. 195) (and the discussion around those exhibits) (details of the sub-sectors are given in Box A4-Box A18, pp. 285-298).

²⁰⁷ Please refer to Table 8.15 (p. 214) and the discussion around that summary assessment table.

²⁰⁸ See Figure 8.1 (p. 170) and the discussion around that diagram.

centres) – that can be accommodated and grown in Meath, given skills availability and existing inward investment companies in the county. A major challenge for the implementation of the Economic Development Strategy (perhaps *the* most important challenge) will be to advance the share of all employment in Meath accounted for by this key sector, whilst also supporting the growth of other sectors so that their employment shares are (at least) maintained. In particular, we are projecting on the basis that there will be significant increase in the employment share of this sector in Meath, by at least 10% on the baseline share of 12.1% in 2011.²⁰⁹ The other sector of note in relation to sectoral change is the construction sector, which in 2011 accounted for a little over 1,700 persons in employment in Meath or an employment share of 4.4%, which was lower than the corresponding figure for the State in that year of 5.9% (Table 8.4, p. 175). While there will inevitably be absolute employment growth in this sector between now and 2022 (as there will be in all sectors), it is important that the construction sector in Meath does not grow unsustainably (as occurred during the pre-crash property bubble) and our projections incorporate a small increase in the employment share attributable to construction in 2022 (from 4.4% to 4.5% or average annual growth in absolute employment in the sector of 1.9% in the Meath labour market, in line with the national employment projections). The beneficial sectoral changes or share shifts in the two sectors occur only in the positive central and optimistic scenarios, whereas no such changes take place in the negative pessimistic scenario (Figure 8.1, p. 170).

To ensure the biggest employment impacts in the Economic Vision, it will be important that all economic and spatial/planning levers relevant to Meath County Council, as leader in the implementation of the Economic Development Strategy, are in place and pulled upon during 2014-2022, and this will entail promoting FDI (including through harnessing of the county's important commuter resource), delivering and promoting the identified sites plus all suitable workspaces in the county in recognition of the possibility of attracting smaller FDI firms as well as supporting the growth of indigenous enterprises.

Central Scenario

The results for the central scenario in respect of total employment within Meath (i.e. the sum of the number of persons both living and working in the county and the inbound commuters or those living elsewhere but working in Meath) are shown in Table 8.17.²¹⁰ Total employment within Meath is projected to grow by 1.7% per annum, from 38,822 in 2011 to 46,921 in 2022 or almost 8,100 in absolute terms (almost 750 additional jobs in the county per year). The other sectors are projected to grow at the same rate, apart from construction (1.9% growth pa) and most significantly the information and communication, financial, real estate, professional, administration and support service activities sector, which is projected to grow by almost 3% per year and with a higher share of 13.5% in 2022.

²⁰⁹ This baseline share for the sector in question can be observed among the figures shown in Table 8.4 (p. 175).

²¹⁰ The corresponding (disaggregated) projections for those both living and working in Meath and the inbound commuters to Meath are presented in the Annex (Table A10 and Table A11, pp. 319-320).

Table 8.17: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Central Scenario

Total Employment within Meath	Persons Employed				CAGR
	2011	%	2022	%	
Total	38,822	100.0%	46,921	100.0%	1.7%
1 Agricultural, forestry & fishing	2,862	7.4%	3,459	7.4%	1.7%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	5,514	14.2%	6,664	14.2%	1.7%
3 Construction	1,719	4.4%	2,114	4.5%	1.9%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	11,180	28.8%	13,513	28.8%	1.7%
5 Information and communication, financial, real estate, professional, administration and support service activities	4,683	12.1%	6,311	13.5%	2.8%
6 Public administration and defence; compulsory social security	2,395	6.2%	2,895	6.2%	1.7%
7 Education, human Health and social work activities	8,149	21.0%	9,849	21.0%	1.7%
8 Other service activities	1,751	4.5%	2,116	4.5%	1.7%
9 Not stated	569	1.5%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A10-Table A11 (pp. 300-301).

The next table adds in the projected figures in respect of the outbound commuters from Meath, the employment of which is predicted to grow from the baseline figure of almost 33,000 in 2011 to almost 40,000 in 2022. Noteworthy in this table is that the key information and communication, financial, real estate, professional, administration and support service activities sector will again grow by more than the other sectors (namely 2.2% versus 1.7%) but the growth of this sector will be less than in the previous table (2.8%), *signifying the objective of the Economic Development Strategy to attain greater economic impact in regard to high value added services within Meath.*²¹¹

²¹¹ The details of the results for the outbound commuters in the central scenario are given in Table A12 (p. 301) and together with the results in Table A10 (p. 299) and Table A11 (p. 300) determine the results in Table 8.18.

Table 8.18: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Central Scenario

Wider Meath Total Employment		Persons Employed				CAGR
		2011	%	2022	%	
Total		71,764	100.0%	86,736	100.0%	1.7%
1	Agricultural, forestry & fishing	3,087	4.3%	3,731	4.3%	1.7%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	9,700	13.5%	11,724	13.5%	1.7%
3	Construction	2,711	3.8%	3,313	3.8%	1.8%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	20,071	28.0%	24,259	28.0%	1.7%
5	Information and communication, financial, real estate, professional, administration and support service activities	12,454	17.4%	15,889	18.3%	2.2%
6	Public administration and defence; compulsory social security	5,367	7.5%	6,487	7.5%	1.7%
7	Education, human Health and social work activities	14,785	20.6%	17,870	20.6%	1.7%
8	Other service activities	2,867	4.0%	3,465	4.0%	1.7%
9	Not stated	722	1.0%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A10-Table A12 (pp. 300-302).

Optimistic Scenario

The optimistic scenario incorporates the same sectoral shifts as included in the central scenario but the rate of growth of employment is even greater, as can be seen in the results presented in the next table.

Table 8.19 projects the total number of persons working in Meath in 2022, where it is estimated that the total number working in the county will rise by almost 9,500 or by in the region of 850 persons per year. In this case, it is projected that the key information and communication, financial, real estate, professional, administration and support service activities sector will grow by 3% per annum, compared with 2% for the other sectors (apart from construction, which will grow by slightly more than the average, namely by 2.1% pa).²¹²

²¹² The detailed results for those both living and working in Meath and the inbound commuters giving rise to the results in Table 8.19 are presented in Table A13-Table A14 (pp. 322-323).

Table 8.19: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Optimistic Scenario

Total Employment within Meath		Persons Employed				CAGR
		2011	%	2022	%	
Total		38,822	100.0%	48,179	100.0%	2.0%
1	Agricultural, forestry & fishing	2,862	7.4%	3,552	7.4%	2.0%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	5,514	14.2%	6,843	14.2%	2.0%
3	Construction	1,719	4.4%	2,170	4.5%	2.1%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	11,180	28.8%	13,875	28.8%	2.0%
5	Information and communication, financial, real estate, professional, administration and support service activities	4,683	12.1%	6,481	13.5%	3.0%
6	Public administration and defence; compulsory social security	2,395	6.2%	2,972	6.2%	2.0%
7	Education, human Health and social work activities	8,149	21.0%	10,113	21.0%	2.0%
8	Other service activities	1,751	4.5%	2,173	4.5%	2.0%
9	Not stated	569	1.5%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A13-Table A14 (pp. 303-304).

Table 8.20 builds in the projected figures for the outbound commuters from Meath, the employment of which is projected to grow from approximately 33,000 in the baseline year of 2011 to about 41,000 in at the end of the period (2022). Notable in this table is that the important information and communication, financial, real estate, professional, administration and support service activities sector will again grow by more than the other sectors (namely 2.5% versus 2%); however, the rate of growth of the sector will be lower compared with the preceding table (3%), illustrating the goals of the Economic Development Strategy to attain greater economic impact in high value service activities within Meath.²¹³

²¹³ The detailed results for the outbound commuters in the optimistic scenario are shown in Table A15 (p. 304) and together with the results in Table A13 (p. 302) and Table A14 (p. 303) give rise to the results in Table 8.20.

Table 8.20: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Optimistic Scenario

Wider Meath Total Employment		Persons Employed				CAGR
		2011	%	2022	%	
Total		71,764	100.0%	89,061	100.0%	2.0%
1	Agricultural, forestry & fishing	3,087	4.3%	3,831	4.3%	2.0%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	9,700	13.5%	12,038	13.5%	2.0%
3	Construction	2,711	3.8%	3,401	3.8%	2.1%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	20,071	28.0%	24,909	28.0%	2.0%
5	Information and communication, financial, real estate, professional, administration and support service activities	12,454	17.4%	16,314	18.3%	2.5%
6	Public administration and defence; compulsory social security	5,367	7.5%	6,661	7.5%	2.0%
7	Education, human Health and social work activities	14,785	20.6%	18,349	20.6%	2.0%
8	Other service activities	2,867	4.0%	3,558	4.0%	2.0%
9	Not stated	722	1.0%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A13-Table A15 (pp. 303-305).

Pessimistic Scenario

Finally, the next two tables pertain to the pessimistic scenario, where the rate of employment growth is substantial lower than the central and optimistic scenarios and there is no change in the composition of employment among sectors in 2022 on the baseline situation in 2011.²¹⁴

The projections displayed in Table 8.21 show very muted employment growth in this scenario but the likelihood of the pessimistic scenario is low, in our view.²¹⁵

²¹⁴ It will be noticed in the tables pertaining to the pessimistic scenario that projections are also carried out for the 'Not stated' category; whereas in the central and optimistic scenarios the numbers in that category are re-assigned to sectors as part of the change in sectoral employment process.

²¹⁵ The tables in the Annex underpinning these results are given in Table A16-Table A17 (pp. 305-306).

Table 8.21: Projections of Persons Employed in County Meath by Sector in 2022 – Total Employment within Meath (Excluding Outbound Commuters) in the Pessimistic Scenario

Total Employment within Meath		Persons Employed				CAGR
		2011	%	2022	%	
Total		38,822	100.0%	40,320	100.0%	0.3%
1	Agricultural, forestry & fishing	2,862	7.4%	2,972	7.4%	0.3%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	5,514	14.2%	5,727	14.2%	0.3%
3	Construction	1,719	4.4%	1,785	4.4%	0.3%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	11,180	28.8%	11,611	28.8%	0.3%
5	Information and communication, financial, real estate, professional, administration and support service activities	4,683	12.1%	4,864	12.1%	0.3%
6	Public administration and defence; compulsory social security	2,395	6.2%	2,487	6.2%	0.3%
7	Education, human Health and social work activities	8,149	21.0%	8,463	21.0%	0.3%
8	Other service activities	1,751	4.5%	1,819	4.5%	0.3%
9	Not stated	569	1.5%	591	1.5%	0.3%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A16-Table A17 (pp. 306-307).

Even when the wider labour market in Meath (inclusive of the outbound commuters) is considered, the employment projections associated with the pessimistic scenario are seen as very muted (but they are also less likely compared with the central and optimistic scenarios, in our opinion).²¹⁶

²¹⁶ The details of the projections for the outbound commuters in the pessimistic scenario are given in Table A18 (p. 307) and along with the projections in Table A16 (p. 305) and Table A17 (p. 306) underpin the Table 8.22 projections.

Table 8.22: Projections of Persons Employed in County Meath by Sector in 2022 – Wider Employment relating to Meath (Including the Outbound Commuters) in the Pessimistic Scenario

Wider Meath Total Employment Total	Persons Employed				CAGR
	2011	%	2022	%	
	71,764	100.0%	74,532	100.0%	
1 Agricultural, forestry & fishing	3,087	4.3%	3,206	4.3%	0.3%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	9,700	13.5%	10,074	13.5%	0.3%
3 Construction	2,711	3.8%	2,816	3.8%	0.3%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	20,071	28.0%	20,845	28.0%	0.3%
5 Information and communication, financial, real estate, professional, administration and support service activities	12,454	17.4%	12,934	17.4%	0.3%
6 Public administration and defence; compulsory social security	5,367	7.5%	5,574	7.5%	0.3%
7 Education, human Health and social work activities	14,785	20.6%	15,355	20.6%	0.3%
8 Other service activities	2,867	4.0%	2,978	4.0%	0.3%
9 Not stated	722	1.0%	750	1.0%	0.3%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The results in this table are the sums of the corresponding results in Table A16-Table A18 (pp. 306-308).

Further Validation of the Projected Level of Employment in 2022

It will be noted that in the presentation of the projected levels of employment we have not shown the estimates for 2016 (the next census year). This is intentional and reflects the fact that the Economic Development Strategy will be less than 2 years in implementation by this time, which would be too short a time period to expect significant change in employment, let alone change in the composition of employment by sector as we would hope and plan to observe by 2022. Nevertheless, the next set of census results in that year (i.e. 2016) will provide the opportunity to examine in some detail the extent of economic development in Meath, in the context of the Economic Development Strategy and in comparison with the situation in 2011. This will be part of the important function of monitoring progress, on which we comment further in Section 9.

As a further check on the validity of the employment projections, we have examined them in the context the likely population of Meath in 2022 (using independent evidence on population projections) and we have also considered housing demand.

The CSO produces population projections for the 8 regional authority areas – including the Mid-East Region and the Dublin Region – as well as the State at five-yearly intervals (2016, 2021 etc.). It does not produce population projections at county level. Such population estimates are generally provided for in county development plans and the Meath CDP 2013-2019 (as varied) projects that the population of the

county will be 195,898 in 2016 and 210,260 in 2022 – based on the RPGs for the GDA 2010-2022.²¹⁷ These population projections are higher than those implied by the CSO's population projections.

Table 8.23 shows the population projections for the Mid-East Region, the Dublin Region, the GDA (the sum of the Mid-East and Dublin Regions), the State and Meath in 2022. The estimates for 2022 are based on the average annual growth rate during 2016-2021, which we have applied to the 2021 projections to derive the figures for 2022. The estimates derived for Meath assume the same growth rates as the Mid-East Region for 2016 and 2021 and the estimate for 2022 was derived in the same way.

Table 8.23: Relevant Population Projections in 2022

Region	CSO Projected Population	
	2011	2022
<i>Mid-East</i>		
Number (000)	534	595
% Change		11.5%
% of State	11.7%	12.1%
<i>Dublin</i>		
Number	1,262	1,374
% Change		8.9%
% of State	27.6%	28.0%
<i>Greater Dublin Area</i>		
Number	1,796	1,969
% Change		9.6%
% of State	39.3%	40.1%
<i>State</i>		
Number	4,575	4,913
% Change		7.4%
% of State	100.0%	100.0%
<i>Implied Meath</i>		
Number	184,135	205,308
% Change		11.5%
% of State	4.0%	4.2%

Source: CSO population projections, consultancy team analysis.

Note: The CSO population projections used here are based on the M2F2 Recent scenario. The population projections for Meath are our estimates based on the CSO's projections.

In the last census year (2011), the population of Meath was recorded at 184,135 persons, which meant that the county accounted for 4% of the national population. According to our analysis of the CSO's population projections, the population of Meath will rise to 205,308 in 2022, representing over 21,000 additions persons or a cumulative growth rate of 11.5% during 2011-2022. This rate of growth for Meath, which reflects the implied rate of growth for the Mid-East Region (on the basis of the CSO's projections), means that Meath's share of the country's population will increase to 4.2% in 2022.

²¹⁷ See Table 2.3 of the Meath CDP 2013-2019 (Volume 1, p. 14).

What does this mean for the employment growth projections? In other words, what will be the scale of employment within Meath in 2022 relative to the county's population in that year, and related to this is the further question of the additional housing units that will be required to accommodate the greater economic activity projected?

In 2011, the 38,822 jobs within Meath represented 21% of the population (including those of working age plus young and old dependants, who are also relevant to consider here). In 2022, in the optimistic scenario, where the projected number of jobs will be greatest, the estimated 48,179 jobs in Meath will represent 23.5% of the projected population, meaning a little more pressure compared with the situation in the baseline year of 2011. However, we do not consider that the additional economic activity in the initial years of the next decade will put any significant pressure on local services mainly for the reason that the relatively low figure observed in 2011 occurred at a time when the country was still in the middle of a very deep recession – thus, in any event, we would expect the number of jobs as a proportion of the population in Meath to be higher in 2022 compared with 2011 (i.e. 23.5% versus 21%).²¹⁸

As outlined in the Meath CDP 2013-2019 (as varied), just as the majority of additional employment in the county will be concentrated in the economic hierarchy, so it is planned that the additional population will be accommodated in the principal towns according to the settlement hierarchy.²¹⁹

Turning to housing needs, in respect of the projected population of Meath in 2022 (i.e. the aforementioned estimate of 210,260), the current Meath CDP envisages a housing allocation of 95,458 units in that year (or an additional almost 26,000 housing units on the 2011 situation based on the quantity of committed units and an average household size of 2.9 person recorded in the 2011 census).²²⁰

Expected Value of Employment in 2022 – Incorporating the Central, Optimistic and Pessimistic Scenarios Simultaneously

We can bring together the three scenarios into an 'expected value' case in helping to underline the Economic Vision for Meath 2022. The expected value analysis brings together the central, optimistic and pessimistic scenarios simultaneously and the next two exhibits give the results of this analysis for (1) total employment within Meath and (2) wider Meath employment respectively where use is made of the following likelihoods, which we consider are reasonable:

²¹⁸ If the higher population estimate of 210,260 in 2022 stated in the Meath CDP 2013-2019 (as varied) obtains, the projected number of jobs in the optimistic scenario (i.e. 48,179) will represent a smaller proportion of the population of Meath in 2022 (namely 22.9%).

²¹⁹ As shown earlier in Table 3.1-Table 4.2.

²²⁰ On 6 August 2014, the ESRI published a research paper on projected population change and housing demand (at county level) (http://www.esri.ie/publications/latest_publications/view/index.xml?id=4060). The (short) report concludes, *inter alia*, that of the 90,000 additional housing units that the ESRI estimates will be required between 2011 and 2021, over 60% (54,000 units) will be needed in Dublin and a further 26% will be needed in Counties Louth, Meath, Kildare and Wicklow, suggesting about 23,400 additional units in these counties, which in turn would suggest that the ESRI's figures may be underestimated when the envisaged additional units in the Meath CDP, and other county development plans, are considered. To be fair to the ESRI, with whom we consulted on this, the 90,000 figure refers to the number of units needed in the counties that are expected to have a deficit in the absence of any additional construction. On this understanding, and given the aforementioned additional 26,000 housing units by 2022 provided for in the Meath CDP (as varied), the additional numbers on top this figure (estimated by the ESRI) are likely to be small in Meath.

- Central scenario – 50% probability of occurrence;
- Optimistic scenario – 35% probability; and
- Pessimistic scenario – 15% chance of happening.

To derive the expected value of given employments N_C , N_O and N_P associated with the central (C), optimistic (O) and pessimistic (P) scenarios in 2022, we apply the following formula:

$$EV_N = P_C N_C + P_O N_O + P_P N_P$$

Where:

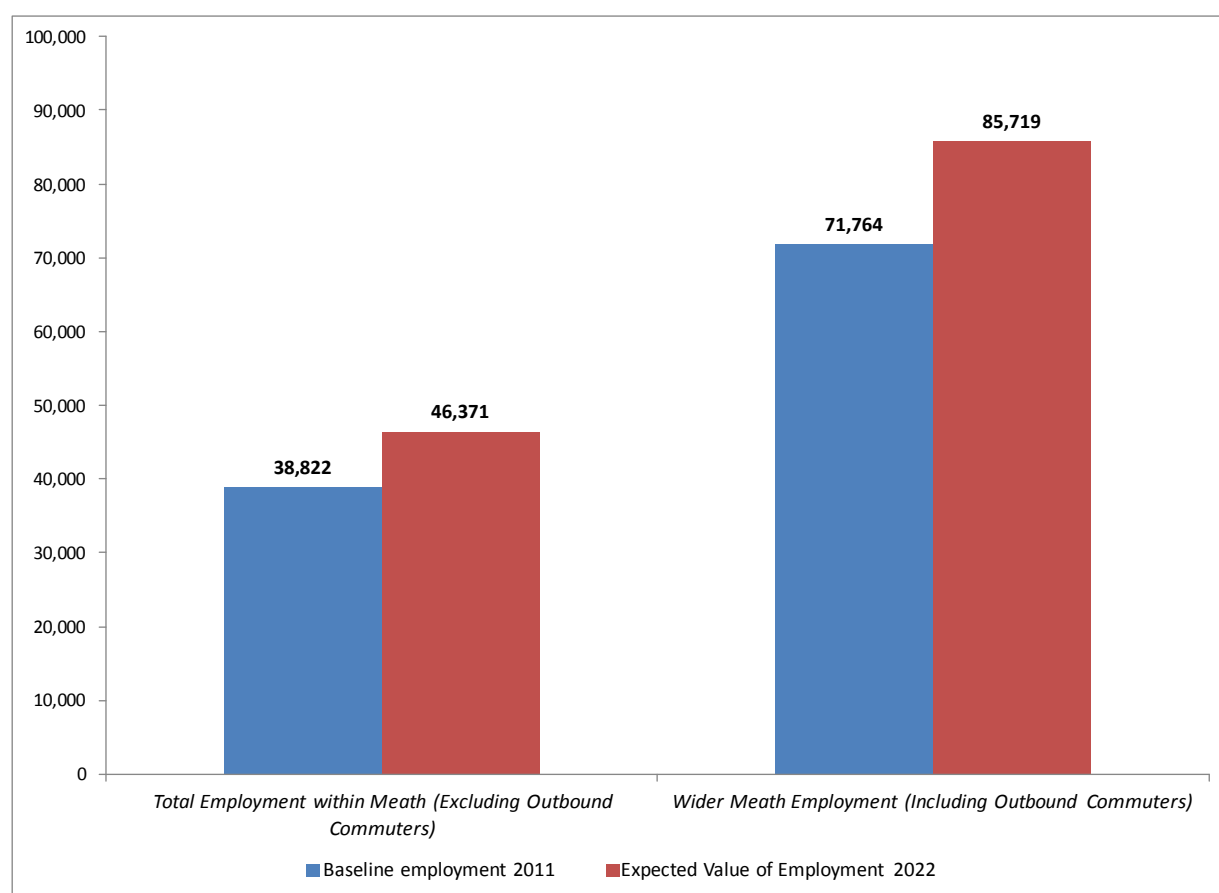
- EV_N denotes the expected value of employment in 2022;
- P_C , P_O and P_P are the probabilities of occurrence associated with the central, optimistic and pessimistic scenarios respectively ($P_C = 0.50$, $P_O = 0.35$ and $P_P = 0.15$); and
- N_C , N_O and N_P are the projected levels of employment in 2022 corresponding with the central, optimistic and pessimistic scenarios.

In deriving the expected value of employment, we are weighting each of the three scenarios by its probability of occurrence and then summing the products (following the general method of deriving the expected value in probability and statistical analysis).

The overall employment projections using the expected value formula are illustrated in Figure 8.5 overleaf, which shows the following:

- The number of jobs within Meath (i.e. among those both living and working in the county and the inbound commuters working in the county) 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 (i.e. including the outbound commuters as well as those both working and living in Meath and the inbound commuters) will increase by almost 14,000 – from the 71,764 observed in 2011 to 85,719 in 2022;
- This implies 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 we consider is reasonable and achievable).

Figure 8.5: Projections of Persons Employed in County Meath in 2022 – Expected Value of Total Employment (Exclusive and Inclusive of Outbound Commuters) Based on the Three Scenarios



Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195), spatial assessment (summarised in Table 8.15, p. 217) and the results of the three scenarios presented in Table 8.17-Table 8.22 (pp. 227-232).

Note: The latter tables are underpinned by the tables in the Annex – Table A10-Table A18 (pp. 300-308).

Table 8.24 overleaf comes in two parts: the top panel shows the expected value of total employment *within* Meath by sector; and the bottom panel shows the expected value of wider Meath employment by sector respectively. The former excludes and the latter includes the outbound commuters. Noteworthy in each case, as in the previous tables of projections (Table 8.17-Table 8.22), are the absolute growth in employment in each and every sector and the higher employment share attributed to the key sector of information and communication, financial, real estate, professional, administration and support service activities. Comparing the projections between the two panels of Table 8.24, it is seen that the bigger employment gain for this important sector will occur *within* County Meath (CAGR 2.5% versus CAGR 2.1%), meaning that growing this sector (in both absolute and share terms) will be key to the goal of retaining more economic impact within the county between now and 2022.

Table 8.24: Projections of Persons Employed in County Meath by Sector in 2022 – Expected Value of Employment – Top Panel Shows Total Employment within Meath (Excluding Outbound Commuters) and Bottom Panel Shows Wider Employment (Inclusive of Outbound Commuters)

Total Employment within Meath Total	Persons Employed				
	2011	%	2022	%	CAGR
	38,822	100.0%	46,371	100.0%	1.6%
1 Agricultural, forestry & fishing	2,862	7.4%	3,419	7.4%	1.6%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	5,514	14.2%	6,586	14.2%	1.6%
3 Construction	1,719	4.4%	2,084	4.5%	1.8%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	11,180	28.8%	13,354	28.8%	1.6%
5 Information and communication, financial, real estate, professional, administration and support service activities	4,683	12.1%	6,154	13.3%	2.5%
6 Public administration and defence; compulsory social security	2,395	6.2%	2,861	6.2%	1.6%
7 Education, human Health and social work activities	8,149	21.0%	9,734	21.0%	1.6%
8 Other service activities	1,751	4.5%	2,092	4.5%	1.6%
Wider Meath Total Employment Total	Persons Employed				
	2011	%	2022	%	CAGR
	71,764	100.0%	85,719	100.0%	1.6%
1 Agricultural, forestry & fishing	3,087	4.3%	3,687	4.3%	1.6%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	9,700	13.5%	11,586	13.5%	1.6%
3 Construction	2,711	3.8%	3,269	3.8%	1.7%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	20,071	28.0%	23,974	28.0%	1.6%
5 Information and communication, financial, real estate, professional, administration and support service activities	12,454	17.4%	15,594	18.2%	2.1%
6 Public administration and defence; compulsory social security	5,367	7.5%	6,411	7.5%	1.6%
7 Education, human Health and social work activities	14,785	20.6%	17,660	20.6%	1.6%
8 Other service activities	2,867	4.0%	3,425	4.0%	1.6%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195), spatial assessment (summarised in Table 8.15, p. 217) and the results of the three scenarios presented in Table 8.17-Table 8.22 (pp. 227-232).

Note: The latter tables are underpinned by the tables in the Annex – Table A10-Table A18 (pp. 300-308). The 'Not stated' category is not shown and is estimated to account for a very small proportion of employment in 2022.

8.5 Summary and Indicative Key Targets by 2022

This section of the report has formulated the Economic Vision for County Meath that can be achieved by the year 2022. The target at which the Economic Development Strategy should aim, in the form of a small number of concisely stated Actions (in the next section), has been carefully put together in an evidence-based manner, reflecting, *inter alia*, the baseline employment situation in respect of the Meath labour market in 2011, the county's comparative economic strengths and sectoral/sub-sectoral opportunities and prospects and consideration of the characteristics and issues associated with a large number and varied range of sites around the county, all of which have the potential to deliver jobs during the lifetime of the Strategy between now and the initial years of the next decade (although it is clear from our assessment that some of the sites are currently more investor-ready than others).

In terms of the key aspects of the target, the overriding objective of the Economic Development Strategy will be to expand employment in Meath. According to our calculations, the total number of jobs *within* the county has the scope to grow by over 7,500 by 2022 compared with the baseline situation in 2011. Around this informed estimate of future employment, it is possible that the number of additional jobs could rise by up to nearly 10,000 on the baseline situation (in the optimistic scenario).

In realising the additional jobs, all sectors of the local economy are expected to grow but we would draw particular attention to the market services sector – which includes internationally-traded services like ICT, financial and business services – and the importance of supporting the growth of this sector to such an extent that its share of total employment in Meath will increase and in absolute terms that it will grow by more than the other sectors. All of the projections outlined in this section are ambitious but achievable.

In terms of underpinning the target employment growth, a key challenge for the Economic Development Strategy is to enhance FDI in Meath. The density or penetration of FDI in Meath is unacceptably low, even as a county with a large outbound commuting population where people work at FDI firms located in Dublin (mostly), Louth and Kildare. The proportion of all employment within Meath accounted for by FDI firms is less than half that for the country as a whole (2.9% as opposed to 7.9% based on accurate data for the latest year for which such information is available, namely the baseline year of 2011). The goal for Meath is to increase the 2.9% proportion towards the national figure in the coming years. In other words, the FDI target is to:

- 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, as shown in Table 8.5, p. 176).

In contrast, Meath's larger indigenous enterprises are strong and growing employers: the proportion of all jobs in Meath accounted for by these firms is well above that for the nation collectively (12% versus 8% in 2011). The goal in respect of indigenous enterprises is two-fold as follows (the first pertaining to all Irish-owned businesses in the county and the second to larger indigenous agency-assisted (EI) firms:

- Reverse the downward trend of recent years in respect of the ratio of self-employed income per head in Meath versus the Status (Figure 7.4, p. 89) so that the ratio favours Meath by 2022; and
- 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 (EI) Irish-owned enterprises (i.e. recalling that the gap observed in 2011 in favour of Meath was 12% versus 8%).

9 Actions for the Economic Development Strategy for County Meath 2014-2022

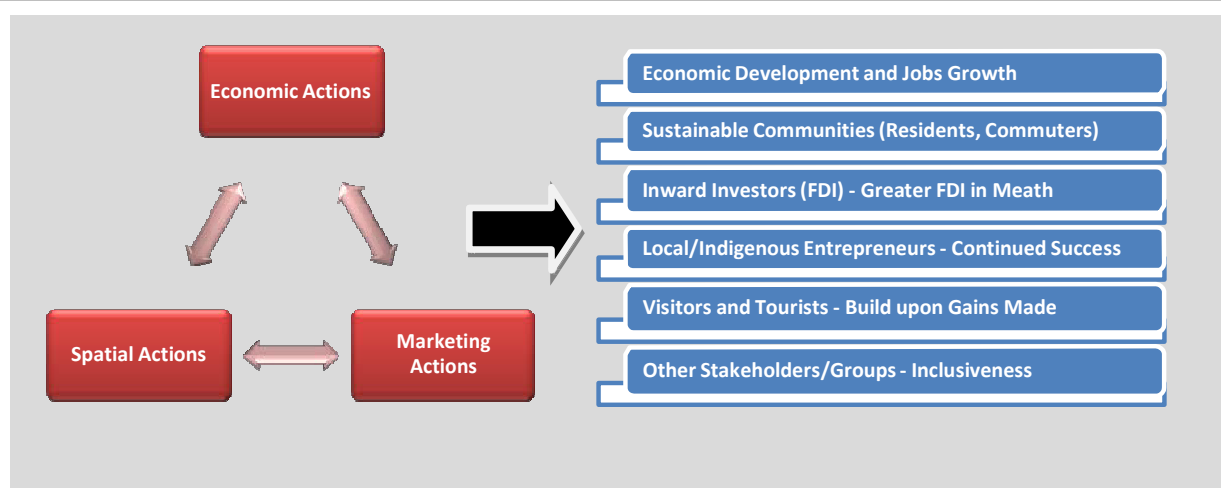
9.1 Introduction

This the final substantive section of the report outlines the Actions that will help to deliver the Economic Vision for Meath formulated and presented in the previous section. The actions are grouped under three headings: (1) Economic Actions; (2) Spatial Actions; and (3) Marketing Actions.

In putting together the Actions, we are mindful of the need to design clear, concise, innovative and evidence-based measures aimed at accelerating the economic transformation, revitalisation and sustainable development of County Meath during 2014-2022. The recommended measures are directed at enabling the county to fulfil its economic potential and to prosper as a successful, diverse and vibrant social, civic, commercial, and residential centre that will be recognised locally, nationally and internationally as a highly attractive and distinctive location in which to conduct business.

We have also been alert to the requirement that the three sets of Actions be integrated in a logically consistent and coherent manner, as illustrated in Figure 9.1.

Figure 9.1: Illustration of the Composition of the Economic Action Plan for Meath



Source: Consultancy team review and analysis.

In terms of implementation of the Actions underpinning the Economic Development Strategy, we are in no doubt that Meath County Council will play the leading role, supported by the MEF, acting in an advisory capacity, and the SPC – Planning and Enterprise, providing governance and oversight. In the process, the Council will also work in partnership with the State agencies (including IDA Ireland, Enterprise Ireland and Fáilte Ireland, and with Meath LEO) and in tandem with the private sector. The ‘machinery’ to support economic growth in Meath is already largely in place and we consider that there is no need to establish any other grouping, such as a ‘high-level implementation body’ drawn (such a move would likely complicate and delay the plan).

9.2 Synopsis of Past and Current Economic Performance of Meath

Our overall assessment is that Meath is a fundamentally prosperous county and one with tremendous economic development potential that can be achieved through appropriate implementation and flexible planning aimed at facilitating sustainable or non-inflationary growth and jobs. However, Meath is not fulfilling its economic potential and the shortfall needs to be corrected as a matter of urgency.

Summary of Comparative Economic Strengths

The county's relative economic advantages (in comparison with most other locations in the country) include its: (i) favourable location in the heart of the most economically important part of the country, namely the GDA, comprising both the Mid-East and Dublin Regions; (ii) strong transport infrastructure, in which the county is traversed by a series of motorways and national primary routes in addition to access to key national infrastructure in the form of Dublin Airport and Dublin Port as well as proximity to Drogheda Port, and the busiest railway line on the island of Ireland (linking its two largest cities, Dublin and Belfast) runs through the eastern part of the county; (iii) positive population and demographic characteristics, among which is the large number of commuters living in the county, who in the last census year of 2011 numbered around 33,000 and who represent an important and unique resource capable of being harnessed to better promote the county as an inward investment location, owing to the strong educational attainment and skills of this group of workers; and (iv) the impressive performance of indigenous enterprises in the county, in which the proportion of all jobs in Meath accounted for by agency-assisted Irish-owned companies is appreciably higher than the corresponding figure for the country as a whole (12% versus 8% in the baseline year of 2011).²²¹

Potential Issues Confronting the Local Economy of Meath – FDI Foremost

However, against these comparative advantages are certain issues confronting the Meath economy, which have been highlighted in our stakeholder consultations as well as arising from our research. Without any doubt, the FDI deficit is the principal challenge. The other issues identified in our study are surmountable or we expect them to ease as the local economy improves with the roll-out of the Strategy. These include the county's currently relatively low educational attainment and the challenge associated with scaling enterprises. Another issue that was brought to the consultancy team's attention during the study is the perception of Meath being a large, diverse county in a complex setting. This is true of other large Irish counties, which are commonly adjudged as comprising sub-counties with different features. But what Meath has in its favour is that it is part of the most competitive and dynamic region in the country – the GDA – and emphasis of the regional dimension needs to be a key part of promoting the county from an FDI perspective in the coming years.

As outlined earlier in the report, the importance of FDI for Meath comes in the context of the country as a whole experiencing rapid growth in inward investment in recent years (even during the recession) – but then again FDI has always been important for Irish economic development (since the 1960s) and will remain so in the foreseeable future. However, the challenge in attracting FDI is that it is constantly evolving and successful host locations, like Ireland, are ever aware of the need to adjust to inward investment needs and the actions of *existing* competitors (like the Nordic countries and Switzerland) as well as *potential* competitors (such as emerging market economies in South America and Asia, and not forgetting locations closer to home, namely Scotland and NI, who are actively seeking to imitate, and even better, Ireland's FDI performance, including through reducing their corporation tax rates).

²²¹ The principal agency in this regard being Enterprise Ireland.

In a sense, Meath needs to act akin to Ireland (in miniature) when it comes to FDI – other counties that have grown FDI, like Louth, have tended to act like this in recent years, and we expect Kerry to behave accordingly (like Kells, Kerry is now also an Assisted Area in the new Regional Aid Map for Europe 2014-2020).²²²

Meath's issues in regard to FDI include:

- The FDI 'story' is not compelling enough (and we suspect not getting out there sufficiently clearly or forcibly);
- The authorities in the county are not acting proactively enough in regard to the IDA (and this is partly manifest in the fact, which has been brought to our attention, that the IDA is conducting site visits in the county but without the knowledge of Meath County Council, which we believe is unacceptable – unless there are valid reasons for this practice, for example on confidentiality grounds); and
- There is an infrastructure deficit in relation to attracting the interest of prospective inward investors, notably the absence of advance buildings or their planning, even though, as illustrated in Section 8, the county appears to be 'site-rich' (but sites, even serviced sites, *on their own* are proving not to be sufficient to ensure FDI, reflecting recent trends in, and intensifying international competition for, FDI activities (and we earlier quoted words from the former CEO of IDA Ireland, Mr. Barry O'Leary, emphasising the importance of property solutions for attracting FDI in host locations).²²³

The good news is that each of these issues can be addressed by Meath County Council and its partners in implementing the Economic Development Strategy and thus there is scope to address the FDI deficit.

Regarding how to make the FDI 'story' more compelling, an 'FDI narrative for Meath' needs to be put together, and refreshed regularly (e.g. when new investments occur or when new positive economic evidence about the county comes to light). As part of this narrative, there should be:

- Emphasis on the significant regional dimension to Meath, in which the message is communicated that Meath is an integral part of the region and seamlessly connected with the whole location enabling access to;
 - A range of key skills for high-end services and high-tech manufacturing
 - International and national markets *via* roads, airport and ports
 - Innovation infrastructure – universities and institutes of technology (IoTs)

The message must also include the fact/requirement that these qualities are available on cost-competitive terms (this will be a key USP or differentiator to the Dublin Region).

In terms of the requirement to plug in more proactively with the IDA, we consider (from our consultations) that there may be a communication mismatch between the authorities in Meath and the State agency, which can be resolved through clearer lines of communication (which points to the importance that one should never assume or take for granted that another economic actor will necessarily have full information given the imperfect world in which we inhabit).

²²² Just as Ireland promotes itself as the 'best small country in the world in which to invest' (or words to that effect), so Louth's branding includes the 'best county in Ireland to do business' (or words like that).

²²³ *Supra* footnote 53 (p. 40) on the advanced buildings in planning for FDI in Athlone and Waterford.

This implies that the powers that be in Meath (i.e. Meath County Council) will need to continually reinforce the county's FDI narrative to the IDA, whose attention is being continuously courted by other counties looking to enhance their share of Ireland's inward investment pie. Underpinning the need for Meath County Council to adjust its behaviour in regard to the IDA are the following facts:

- The IDA's incentives are aligned with those of Meath, namely to facilitate more sustainable FDI;
- But the IDA also needs to be told the 'story' regarding Meath's attractiveness as a host location for inward investment, and continually so (selling requirement).

In regard to FDI infrastructure, while we have observed that Meath may be site-rich, it needs to advance further and ensure that all sites with the potential for accommodate FDI are adequately serviced with appropriate access and transport links, plus high-speed broadband. This is the case presently with the IDA Business and Technology Parks in Navan and Drogheda. However, these facilities are not fulfilling their potential, owing to the fact they have not attracted any new tenants in recent years and most of the lands in the two parks are currently unoccupied or available for new FDI. Accordingly, a radical, interventionist approach may be needed to address the situation and we believe consideration should be given to the prospect of Meath County Council partnering with a private investor/developer/landowner to acquire some or all of the available lands in each case with the view to constructing advance buildings, which would make the parks more attractive to potential FDI firms, and the IDA. Otherwise, without such direct action, the likelihood is that the IDA parks in Navan and Drogheda – the two principal settlements in the economic hierarchy in the Meath CDP 2013-2019 (as varied) – will remain largely unoccupied during the lifetime of the CDP (while recognising that the existing FDI firms operating in the parks make a very valuable contribution to the Meath economy). This possibility is already provided for in the Meath CDP and we would advocate that the objective (namely ED OBJ 5) is followed up at the earliest possible opportunity on foot of this report. ED OBJ 5 places on the Council the objective:

"To explore joint ventures with developers/industrialists/landowners to develop strategic sites in designated economic growth areas/centres consistent with the Regional Planning Guidelines for the Greater Dublin Area. The fast-tracking of statutory planning consents shall be facilitated and encouraged which may include the use of appropriate statutory instruments, to include, inter alia, Part VIII planning consent for site development works or indeed for the entire development, preparation of Motorway Orders, etc. This process should include the reservation of prize sites which would be suitable for or comparable to the IDA "strategic sites" which could support investment from large Foreign Direct Investment (FDI) firms which may have significant space requirements".

The significance of this recommendation being advanced here cannot be highlighted enough, if Meath is to address its underperformance in FDI and attract high value services and high-tech manufacturing in the coming years. As well as Navan and Drogheda, we believe there is potential to attract such investment in other key sites in the county, including the Pace site in Dunboyne, given its occurrence in the Metropolitan Area and the lands to the north of Ashbourne Business Park, which are also currently zoned for E1 employment uses. There are other opportunities for FDI around the county, including Kells – given its recent EU designation as an Assisted Area (2014-2020).²²⁴

²²⁴ See Box 7.2 (p. 112) on the recent FDI announcement for Kells (August 2014).

More generally in respect of the employment objectives E1-E3 provided for in the Meath CDP (for indigenous as well as FDI employment), there is merit in Meath County Council adopting a more flexible approach as far as possible (such flexibility will be needed if the county is to seize on any opportunities that may come its way during the years ahead). While specific identified uses may be appropriate for E1, E2, E3 lands, all employment-generating uses should be “open for consideration” under each zoning objective (as well as “permitted in principle”).²²⁵

Property solutions aimed at facilitating more FDI and indigenous industry development should not necessarily be concentrated on relatively large developments on serviced greenfield sites. A wider approach needs to be implemented to ensure optimal usage. As noted earlier in the report, in the extensive discussion of recent trends in FDI in Ireland (Section 2), one of the current targets of the IDA are ‘first-time’ multinationals or enterprises who have gained a competitive edge in their home countries and now wish to deploy their new-found advantages overseas. Firms in this category and active in services tend initially to require relatively small property spaces in host countries and the consultancy team is aware of instances in other parts of Ireland in which new entrant FDI firms are working from small workspaces (including enterprise centres and incubation spaces, aimed at providing a ‘first-base’ for FDI firms, from which they may grow). Related to this are cases of larger and well-established multinationals in Ireland requiring additional office space to serve their expansion needs or accommodate their goals to facilitate more flexible working patterns, including helping skilled workers to do so closer to where they live. There is thus a need to take a wide-ranging and flexible approach in regard to accommodating the needs of different forms of FDI, catering for small-scale as well as large-scale requirements.²²⁶ Indeed, the recent FDI win in Kells (August 2014) represents a relevant example of this point (see Box 7.2, p. 112).

Accordingly, Meath County Council should undertake an audit of all property spaces around the county (office, commercial, industrial etc.) so that it would be in a position to offer potential solutions to prospective inward investors and/or the IDA at short notice, and, needless to say, the database of property solutions should be capable of being updated on a regular (say monthly) basis. In helping to construct and operate this initiative, Meath County Council should forge links with property providers or estate agents around the county – this might be best facilitated through liaison between the Council and chambers of commerce/local business groups, regardless of whether they are affiliated to Chambers Ireland or not. On the understanding that such a resource is currently not available, the main requirement will be to put the database together in the first place, after which it should be straightforward to amend and update the database. The initiative would also be available to help local entrepreneurs and growing local firms as well as FDI.

²²⁵ Such flexibility is also stated in the Troika’s first post-bail out surveillance report (*supra* footnote 110 (p. 80).

²²⁶ For example, Pramerica Systems Ireland is one of the largest FDI firms in Letterkenny, Co. Donegal. A US firm, active in software development and customer support, Pramerica currently employs in the region of 1,000 people and is known as a champion of flexible/home working arrangements. The firm started its operations in Letterkenny in a single office building in June 2000 and then expanded into a second office building in June 2001. In August 2007, it moved from the first building to a larger third building, which gained the company extra capacity for growth. When it opened in Letterkenny in June 2000, it had 88 employees at the end of that year involved in software development and quality assurance software testing. Since then, Pramerica has continued to expand its operations – from the 88 employees at the end of 2000 to 800 in 2008 to around 1,000 presently – in various roles, including systems management, project management, business analysis, systems analysis, software development, software testing, technical environment support, financial analysts, call centre, technical help desks and security administration. More than one-fifth of Pramerica’s employees are involved in ‘teleworking’ from locations throughout the country, including in small offices in multi-tenant office buildings.

Illustrative Evidence-Based Examples of How to Pitch Meath More Compellingly for FDI

Coming back to the need to portray a more compelling narrative designed to enhance FDI into County Meath, we would again emphasise the importance of the *regional dimension* as well as the county's USPs. What follows are some examples for illustrative purposes, which may form the basis of the Marketing Actions in regard to FDI.

- The regional dimension, including pitching Meath as a cost-competitive location within this most vibrant part of the country with scale and critical mass;
 - Meath is located in the heart of the most dynamic, productive and innovative part of Ireland (the GDA or Greater Dublin Area)
 - Population in excess of 1.8m people, 40% of the country
 - Population aged 20-44 years 750,000, 43% of country
 - Labour force 910,000+, 41% of country
 - Persons at work 750,000+, 42% of country
 - Only region in Ireland in which primary income exceeds disposable income, illustrating the region's underlying economic performance and prosperity
 - Meath motorways and corridors (M1, M2, M3 and M4) ensure seamless connectivity with the region (all of the motorways are linked with the M50 Dublin orbital, making access to the capital and its labour pool convenient)
 - Close proximity to Dublin Airport and Dublin Port guarantees access to international markets for manufactured goods (both traditional and high-tech)
 - Meath offers investors lower costs within this most productive region
- In terms of educational infrastructure and skills in the region, Meath enjoys ease of access to;
 - Four of Ireland's leading universities – TCD, UCD, NUIM (Maynooth University) and DCU
 - Plus located next to the same number of leading IoTs – DIT, AIT, DkIT and ITB
 - These 8 higher education institutions on the doorstep of Meath account for;
 - 60,000+ full-time undergraduates (U/Gs)
 - 13,000 full-time postgraduates (P/Gs)
 - Further 16,000+ part-time U/Gs and P/Gs
 - 57% of all P/Gs in Ireland
 - 45% of all students enrolled in higher education courses in Ireland
 - 5,400 European and international students (non-Irish/UK) – 46% of all such students in Ireland (access to foreign language skills)
 - > 60% of all European students studying in Ireland
 - 51% of non-Irish/UK citizens resident in Ireland live in the region
 - These residents include Europeans, Asians and Africans
- Furthermore, the eight main higher education institutions in the region of Meath account for a significant share of Ireland's research and commercialisation expertise, viz.;
 - Over 46% of all academic staff in the country
 - Over 54% of all research income in the State
 - 55% of all patent applications in Ireland and all other countries
 - 40% of all patents granted in Ireland and all other countries
 - 53% of all licence agreements with private industry
 - 56% of all spin-out companies created at HEIs in Ireland
- In terms of enterprise development, the region in which Meath is located accounts for;
 - Over 61,000 permanent FTEs in agency-assisted Irish companies or 41% of all such employment in Ireland (2013)

- An even larger proportion (c. 50%) of permanent FTEs in agency-assisted foreign companies in Ireland (2013)
- Existing multinationals in Meath include
 - US, UK, Italian, German, French, Dutch and Chinese companies
 - Active in a range of sectors – financial services, shared services, med-tech, investment fund management, biotechnology, various manufacturing
 - Located across the county – Navan, Drogheda, Dunboyne, Trim, Enfield, Ashbourne, Slane.

It will be noticed that the above facts pertain to the region in which Meath is located and are designed to illustrate the scale and critical mass which locating in the county offers – including key knowledge infrastructure, existing enterprises (including FDI) and transport infrastructure facilitating access to international markets, which are key ingredients sought by FDI firms.

Particular county-level qualities possessed by Meath with promotional potential include the following facts:

- Almost 50,000 residents at work aged between 20 and 44 years;
- In the region of 25,000 residents at work with third-level educational qualifications;
- Approximately 14,000 residents at work classified as employers and managers;
- A further 5,000 or so residents working as higher professionals, with skills in law, accounting, finance, engineering, science and technology, computing and software, and languages;
- An additional 12,000 other professionals in residence in the county at work with supporting skills in these areas;
- Well over 6,500 skilled manual residents at work in Meath, with skills and experience in engineering, manufacturing, technology etc.;
- Favourable drive-times – for example, up to and over 1 million people live in the wider catchment areas of the county's main economic centres (like Navan, Drogheda, Dunboyne, Kells and Ashbourne).

In the past year, with the arrival of the new CEO at Meath County Council, the formation of the MEF and other initiatives, including the Maynooth University (NUIM) economic baseline study and this report, new publicity material regarding developing the Meath economy and main towns therein has been put together. The consultancy team has reviewed this material and believes it is of high quality and worthy of use in promoting the county for FDI and other economic development.

9.3 Economic/Strategic Actions

External and Internal Audiences and Actions – Action 1, Action 2 and Action 3

Action 1: Adoption, dissemination and practice of the Economic Development Strategy for County Meath 2012-2022 at all levels within and across Meath County Council, including among elected representatives as well as officials of Meath County Council.

Organisationally, Meath County Council as a whole needs to be fully comfortable with, and fully committed to, the Economic Development Strategy for Meath (2014-2022). It should not just be seen as a matter for senior staff or staff in certain directorates but should apply, and 'be owned', throughout the whole organisation. This will necessarily entail a process of dissemination across the organisation but the overall aim will be to encourage and nurture a culture or set of work practices within and throughout the organisation in which all staff are aware of the economic consequences of their actions.

This overriding action is now expected of all councils through the country, under Putting People First (2012) and the Local Government Reform Act of 2014. In the years ahead, successful counties, economically speaking, will be those that follow this type of action throughout their organisations and succeed in inculcating a culture of 'thinking jobs and facilitating sustainable economic development'. While officials and elected representatives within councils do not directly create new jobs, their everyday actions can have an important bearing on facilitating job creation and this potential to influence local economic development should be appreciated at all levels of staffing within Meath County Council. Sometimes, and generally speaking, an official may (innocently or inadvertently) hinder economic development and potential new jobs in response to an initial query from a developer or wealth creator by referring to a series of obstacles or restrictions from a planning perspective. While this is no fault of the official, we nevertheless believe there is an onus on local authorities to commence an educative process that facilitates such opportunities to be acted upon constructively. Negative initial contacts with a local authority can be very off-putting for an investor. Another way of mitigating any problem in which a genuinely beneficial development proposal is cut short initially is to ensure a team-based approach to screening planning inquiries, proposals etc., so that experienced as well as junior planners and economic development personnel can input into the decision-making process early on.

Underpinning all of the Council's interactions with developers, investors, wealth creators and enterprises (of all forms) should be a 'can-do' attitude or 'how can we assist you?', whilst ensuring sustainable development.

We appreciate that implementing this action will necessarily take some time but nevertheless should be followed up as a fundamentally important cross-cutting theme throughout the whole of Meath County Council. It will be important that senior officials with the capacity to facilitate job creation in Meath are made aware of any new initiatives with the potential to result in job creation throughout the local political process (for example, if an elected representative has a unique 'lead' that may lead to job creation, an 'open-door' system should be in place where the elected representative can liaise with the CEO of the Council and/or Directors of Services to ensure that any barriers or issues can be resolved in seeking to realise the new jobs locally). It is also to be expected that Meath County Council will engage in a process of observing similar actions aimed at job creation in other local authorities, with the objective of identifying good/best practices that may then be applied or adapted for Meath.

Responsibility with the CEO and Directors of Services at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

Action 2: Proactive engagement between Meath County Council and the State agencies – IDA Ireland (FDI), Enterprise Ireland (indigenous businesses) and Fáilte Ireland (tourism), and with Meath LEO (local entrepreneurship and SMEs). Meath County Council should also proactively engage with higher education institutions (HEIs) (including Dundalk Institute of Technology as well as Maynooth University) and other business support agencies (e.g. Meath Partnership). There should also be engagement with the DECLG and national planning authorities in delivery of the identified sites.

This action is consistent with ED OBJ 7 in the Meath County Development Plan 2013-2019 (as varied).

In regard to FDI, it will be important that Meath County Council proactively engages with the IDA on all matters concerning new and existing FDI in Meath (where Meath County Council will be on hand to deal with any queries that potential investors might have, for example). In forging a productive partnership with the IDA, the aim will be to grow initial inquiries and site visits regarding Meath as a host location for inward investment and to ultimately facilitate more FDI and associated employment in the county. In the process, Meath County Council should at all times be aware of any site visits in the county, so that it can liaise with the IDA in regard to facilitation of FDI or learn from the experience in the event that such interest does not amount to any new investment. The engagement with the IDA should also aim to ensure cognisance of all suitable sites and/or properties in respect of inquiries, site visits or other interest from potential investors. We recommend that a senior person with Meath County Council should be in place to liaise with the IDA regarding inquiries and site visits, and a meeting with the IDA should be arranged as soon as possible following agreement of the Economic Development Strategy (ideally that person should be from within the Economic Development Team or be working closely with the directorate responsible for economic development and enterprise within the Council).

Meath County Council and Meath LEO should continue to ensure a comprehensive set of supports to Irish-owned businesses at every stage of the enterprise lifecycle. This will necessarily entail liaison with Enterprise Ireland. All business supports, including training and skills development as well as supports aimed at scaling enterprises (mentoring, exports, commercialisation and innovation etc.), should be tailored to meeting the needs of enterprises (i.e. demand-led) rather than being primarily supply-driven. Regionally, Dundalk Institute of Technology (DkIT) is responsible for supporting enterprises and helping to support economic development in Meath (as well as Louth, Monaghan and Cavan) and this relationship with DkIT is very important, owing to the absence of a higher education institution in Meath and the paucity of specialist advice and incubation.

Turning to tourism, Meath has performed well in recent years – the designation of the Boyne Valley as a signature destination among the product offerings promoted by Fáilte Ireland has been a success and the message needs to be continually reinforced so that the signature status is maintained. Planning should also be mindful of ensuring sufficient provision of tourism infrastructure, including visitor attractions as well as a varied range of accommodation.

As well as continuing to build strong relationships with the IDA, EI and Fáilte Ireland, Meath County Council should also seek to do likewise in regard to other agencies, including infrastructure agencies – for example, the NRA and the NTA.

Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

Action 3: Constructive engagement between Meath County Council and businesses (including developers/landowners). Fundamental to this action is to ensure that officials continually think about how best the Council can serve businesses and wealth creators, who have the capacity to help deliver the identified sites and create jobs.

This action pertains to all kinds of businesses and enterprises – of all sizes, ages and in all sectors; indigenous and foreign-owned. There are a number of specific actions that can be taken:

- Meath County Council should undertake a review of all policies, and practices, affecting or having the capacity to affect, new or existing businesses – including, for example, its tendering requirements, where the objective would be remove any disproportionately onerous or unnecessary barriers (inadvertently or otherwise) impinging on small firms entering competitions;
- The policies and practices should also include specific provisions in the current Meath CDP (as varied) – namely the requirements surrounding the preparation of framework plans, phasing of developments, development management objectives (works of art and car parking requirements) and the potential for re-zoning ‘white lands’ for employment on their merits;
- The recommended review should further include examination of the various levies and charges imposed by Meath County Council on developers and wealth creators, in comparison with other local authorities and it would be important that any comparison be conducted on a clearly-defined like-for-like basis (we would recommend that the Council seek out independent evidence on inter-local authority rates and charges);
- Meath County Council should institute a process of assembling data on all available workspaces and properties for entrepreneurs and SMEs (including ‘hot desks’ around the county/region);
- Meath County Council – in tandem with Meath LEO – should institute a database (searchable for members/registered) of mentors and their contact details available to assist SMEs;
- The information on the websites of Meath County Council and Meath LEO designed to support local businesses should also include information on the unique and significant new opportunity from Kells’ recent designation as an Assisted Area under the EU Regional Aid Map 2014-2020;
- The business support information on the websites of Meath County Council and Meath LEO should also draw attention to various other funding opportunities, including those under Enterprise Ireland’s export and innovation support programmes and new funding initiatives/calls coming out of the Irish Regions Office in Brussels, which are regularly circulated to Irish local authorities;
- Consideration should also be given to piloting a CEDRA REDZ in the Kells area (Action 6) and to the establishment of a BIDS (business improvement district scheme) in Navan;
- Meath County Council should carry out an independent (annual) survey of local businesses (like the one presented at the September 2013 meeting of the MEF) to record the degree of satisfaction with Meath County Council and Meath LEO (i.e. under the remit of Meath County Council, partially or fully) and how their supports can be improved.

Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

The independent surveys of local businesses should be carried out annually under the auspices of the MEF through commissioning of robust market research by a market research organisation.

Key Economic Activities and their Potential by Employment

Action 4: Promotion of the hierarchy of economic centres and targeted sectors in Meath with the objective of facilitating significant new enterprise employment in Meath (as outlined in the spatial assessment in Section 8) (see also the map of the Economic Vision for Meath in Figure 8.4 (p. 218)).

The earlier assessment of potential sites and targeted sectors, including cluster opportunities, summarised in Table 8.15 (p. 217), is consistent with Table 4.2 in the Meath CDP (Volume 1, p. 83), which maps targeted sectors for development in Meath against economic centres in accordance with the settlement hierarchy.

In regard to FDI, given Meath's comparative economic strengths and existing FDI operating in the county, plus with an eye on the nature of FDI in other locations in Ireland, we consider that the following activities can be developed in Meath: internationally-traded services – software development, data centres and other software-related activities, financial services, business services; and export-oriented manufacturing activities in the form of med-tech/life sciences/biotechnology. There is limited scope for pharma-chem in Meath, owing to the strength of this activity in other locations in Ireland.

With the exception of the IDA Business and Technology Parks in Navan and Drogheda, which should be specifically promoted for FDI as they were originally intended, the other identified sites, together with other workspaces throughout the county, should be promoted for indigenous enterprise development as well as FDI.

Responsibility with the CEO of Meath County Council and the Economic Development Team within Meath County Council, working in partnership with relevant senior personnel within IDA Ireland in regard to FDI.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

As recommended under Action 2 above, Meath County Council should arrange to meet with the IDA as soon as possible after agreeing the Economic Development Strategy and should have in place at that time the liaison person to interact with the IDA on an ongoing basis.

9.4 Spatial Actions

Introduction

The spatial actions set out below are designed from the perspective of facilitating the delivery of the sites identified with employment potential in Section 8. As an overriding principle, Meath County Council should seek to ensure a high degree of certainty, and flexibility, in planning regarding the delivery of the identified sites for FDI and indigenous enterprise development.

Meath County Council and landowners/developers/investors/wealth creators have the same incentives towards sustainable development, and both parties can benefit from working together in a constructive manner to achieve these objective. It might be thought that there would be a potential conflict of interest between the Council's roles as planning authority, on the one hand, and economic development facilitator, on the other hand, but the consultancy team considers that, in a well-managed system, there should be no such conflict and the county as a whole will benefit accordingly from more jobs becoming available in Meath. Balancing the two roles effectively tends to characterise successful local authorities and other effective public service provision.²²⁷

Availability of Infrastructure and Services on the Identified Sites

Action 5: Meath County Council to undertake an assessment of the available infrastructure and services on all of the identified sites with employment potential, in conjunction with the relevant landowners, the goal being to complete the proposed site services matrix (Table 8.16, p. 220) and to plan for how best to address any deficiencies identified through framework plans etc.

This important exercise will be a valuable planning resource for the Council and will also be of central important to the promotion of available opportunities in the county. In the process, infrastructural deficiencies should be identified in each case and measures for addressing them pursued as a key part of helping to deliver the sites for employment generation. Meath County Council should initiate the engagement process with the landowners.

Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

²²⁷ A case in point is the Irish Competition Authority and how it operates in accordance with the statutory merger control regime in Ireland. Mergers and acquisitions are generally an important part of market-based economies (like Ireland) and are a key feature of the market for corporate control. While M&A activity may sometimes result in less competition in markets, what matters from the perspective of the merger control legislation is whether a proposed transaction will lead to a *substantial* lessening of competition. In deciding on this issue, the Competition Authority seeks to operate flexibly and in an accommodating way with the parties and their advisers, including through liaison and meetings – with a key focus placed on ensuring evidence- based decisions at the end of the process. In early November 2014, new legislation came into effect in respect of the amalgamation of the Competition Authority and the National Consumer Agency.

Site Delivery Mechanisms

Action 6: Meath County Council to consider the possibility of facilitating the development of a Rural Economic Development Zone (REDZ) within County Meath.

The aforementioned CEDRA report outlines the concept of a REDZ, which is designed to enable bottom-up, community-based rural development initiatives in a variety of area, including rural enterprise development and tourism. REDZ may also include the possibility of support to addressing infrastructural deficits in rural locations, such as broadband availability. Given its rural nature, a REDZ may be attractive in the north of the county (Kells area as mentioned earlier in Action 3).

Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

Action 7: Meath County Council to consider the possibility of financial incentives designed to aid the delivery of the identified sites for employment generation.

Section 48 contributions are applied throughout the county to developments that receive planning permission and are paid on foot of commencement of development (there are some types of development that are exempt from such contributions for various reasons, including the size and nature of the development). These contributions are used to meet the costs of infrastructural investments and various facilities throughout the county. In order to incentivise the employment sites identified within this report, the Council should consider targeting certain economic activities with good employment potential (high value) with lower contributions, reflecting the spatial expression of the Economic Development Strategy (Figure 8.4, p. 218).

Consideration could also be given to the application of the contributions payable under the Section 49 Development Supplementary Contribution Scheme for the county through consultation between Meath County Council and the Rail Procurement Agency (RPA).

The Development Contributions Guidelines also afford reduced rates or waivers for IDA/Enterprise Ireland-supported developments and lower rates for town centres to support town centre development. Such provisions should be utilised and enacted to encourage economic development within the county. As outlined in the spatial assessment in Section 8, the recently published Planning and Development (no. 1) Amendment Bill 2014 allows for a revision to development contribution rates as incentives for specific sites. The statutory provision should be utilised and enacted within the Meath County Council Development Contribution Scheme and Supplementary Development Contribution Schemes.

Another potential instrument in respect of incentivising the delivery of the sites concerns the possibility of part of the rate base for an employment fund for the identified sites. The fund could provide the opportunity for investing in additional necessary infrastructure, supporting public-private-partnerships (PPPs) for advance buildings on the sites etc.

Subject to funding, the Council should also consider acquiring unused/underused appropriately located lands for release for enterprise/employment development.

Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.

Commencement from adoption of the Economic Development Strategy by Meath County Council.

9.5 Marketing Actions

Introduction

The marketing and branding component of the Economic Development Strategy for Meath is very important 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.

As part of the development of the Economic Development Strategy, Meath County Council has taken the initiative of overhauling and enhancing the economic development section of its website.²²⁸ The refreshed website is very inviting and, in addition to providing an overview of the qualities of the county from a business and investment perspective, there are also sections on investing in Meath, business news and events (which includes, for example, the recent designation of Kells under the new EU Regional Aid Map 2014-2020), details on the Economic Development Team (including contacts), profiles of towns in Meath, related videos (which are more national than specific to Meath) and there are testimonials from FDI firms and indigenous firms pointing to the value of investing in and operating from Meath. In addition, the specially-prepared brochures on the Meath towns include relevant factual information (from the CSO) on skills and these have been issued to various stakeholders and businesses at various events by Meath County Council during the past year (including to IDA Ireland). Overall, the new look website illustrates the seriousness and commitment of Meath County Council to facilitating economic development and further job creation in the county.²²⁹

In view of the marketing initiatives already underway, including the new website at Meath County Council, the Marketing Actions proposed here are designed to complement and add value to what has already been achieved.

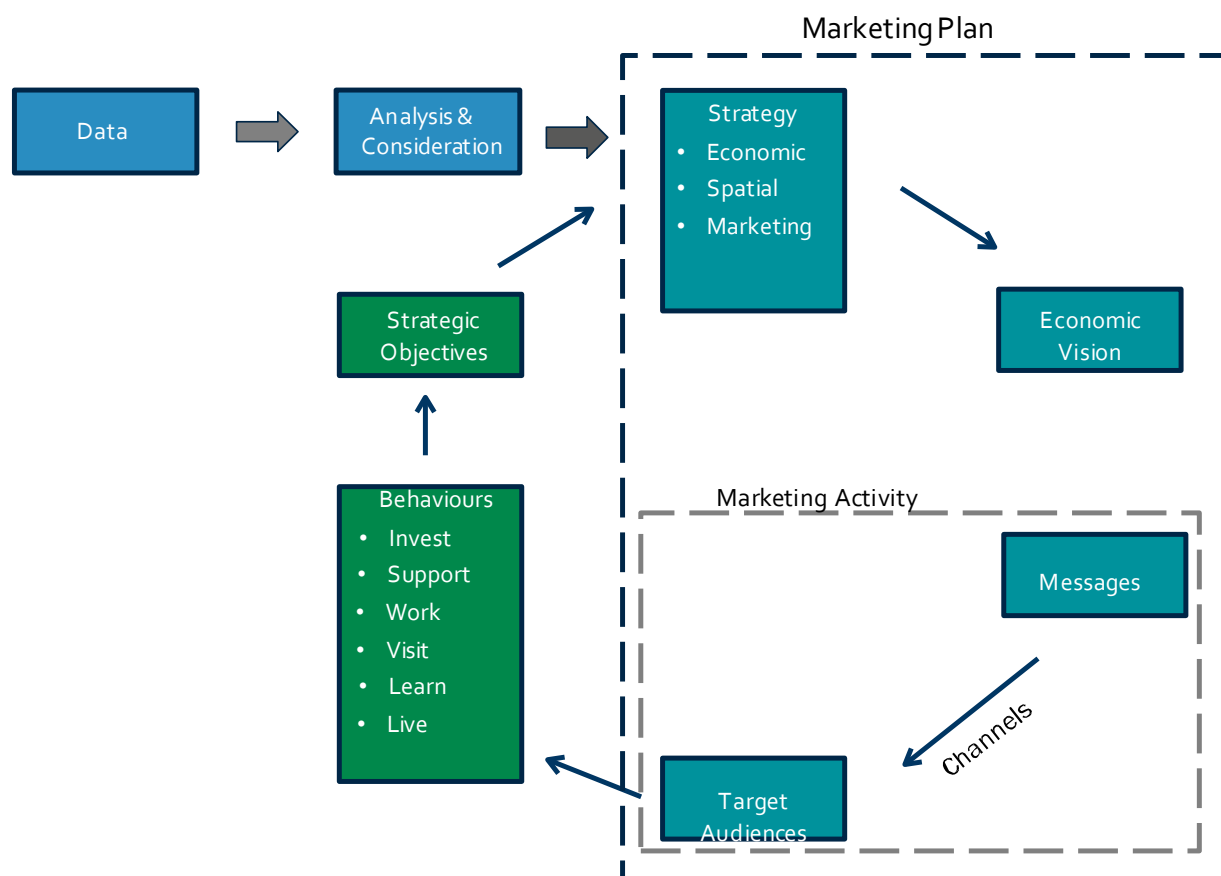
In the process, it is important to be mindful of the requirement for marketing messages to be *continually reinforced and refreshed*. This applies to the key area of FDI as well as other aspects of economic development and it would be incorrect to assume that, once a given marketing campaign has been launched, it will ‘work its magic’ and new interest will be generated as a result. On the contrary, the reality is that the IDA, for example, is constantly bombarded with different interests pushing to promote their own areas, which means that successful promotions must stand out and be as compelling as possible, and should also be continuously portrayed and communicated, for the key messages to adhere. Given its FDI deficit, these marketing practices will be relevant for Meath during 2014-2020.

Schematic Illustration of the Marketing Plan

The Marketing Plan accompanying the Economic Development Strategy is illustrated in Figure 9.2 overleaf. This shows how the Marketing measures proposed here are evidence-based and designed to facilitate the realisation of the Economic Vision for County Meath presented in Section 8. The marketing activity will be based around *key messages* and communicating the messages to *key 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.

²²⁸ Available at <http://www.meath.ie/Business/Overview/>.

²²⁹ The towns covered in the brochures are Ashbourne, Dunboyne, Dunshaughlin, East Meath, Kells, Navan and Trim. Drogheda and its environs in the east of the county are covered in the East Meath profile.

Figure 9.2: Schematic Illustration of the Marketing Plan for Meath 2014-2020

Source: Consultancy team review and analysis.

Key Messages – USPs

A summary of the USPs associated with Meath is given in Table 9.1 below. The consultancy team is of the view that Meath has a large and varied range of comparative attractors, based around its seamless connectivity to the GDA/National Gateway, which should be a key message of the marketing campaign.

Another key requirement – that needs to be assembled as a matter of priority – is to put together, in a marketing document, information on key services associated with the identified sites for economic development (i.e. based on the completed matrix of sites as proposed in Table 8.16, p. 220). This should be done in tandem with the audit or inventory of available properties/workspaces for enterprise development proposed under Action 3.

Table 9.1: Key Messages to Communicate for Meath – Unique Selling Points

<ul style="list-style-type: none"> • Location in the heart of the GDA – the most dynamic, competitive and innovative region of Ireland • Critical mass of population and labour skills • Excellent multi-modal transport facilities in the form of motorways and national transport corridors (M1, M2/N2, M3/N3, M4/N4) linked with the M50 Dublin orbital, Dublin Airport, Dublin Port and Drogheda Port as well as public transport, including the busiest railway line in the country between Drogheda and Dublin and the presence of Parkway Station in Dunboyne • Excellent access to international and national markets by virtue of Meath's transport network and proximity to major national infrastructure (Dublin Airport and Dublin Port) • Ready availability of the largest student, research and commercialisation resource in the country through Meath's access to Ireland's leading universities and institutes of technology 	<ul style="list-style-type: none"> • Meath a cost-competitive location within the National Gateway • Capacity to accommodate and cater for inward investment – large number and varied range of serviced sites and available workspaces suitable for manufacturing and service activities in a range of fields (internationally-traded services, software, med-tech and life sciences, green and clean-tech, data centres, engineering manufacturing, and agri-food processing and product development) • Dedicated Economic Development Team within Meath County Council working in tandem with Meath Local Economic Office, IDA Ireland and Enterprise Ireland to facilitate enterprise development in key activities for every type of business • Meath a county with a unique and unrivalled quality of life <ul style="list-style-type: none"> ○ Large, spacious county with Ireland's richest history and heritage ○ Comprehensive residential stock ○ High quality amenities, leisure and entertainment facilities ○ The home of the Boyne Valley – among Ireland top tourism destinations as promoted under signature status by Fáilte Ireland
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Source: Consultancy team review and analysis.

Target Audiences

The target audiences in respect of the Economic Development Strategy for Meath are summarised in Figure 9.3 overleaf. These external stakeholders will become aware of the wider marketing of the county proposed below but certain key stakeholders will also be intimately involved in delivery the Strategy, including the IDA, Enterprise Ireland and Fáilte Ireland, which are provided for in the actions already presented.

Figure 9.3: Schematic Summary of Target Audiences

Source: Consultancy team review and analysis.

Communications Channels and Marketing Actions

The most value to the marketing process regarding the economic development of Meath during 2014-2022 will be to ensuring the most appropriate channels of communication between the messages and the target audiences (highlighted in the key marketing activity in Figure 9.2).

Branding

Branding can be important for localities and urban centres – as a profile-raising initiative. High profile brands in this regard include, for example, “Love Belfast” and “So Sligo”, and “Louth – The Best County in Ireland to do Business”. At the Commonwealth Games 2014, the host city used the event as part of promoting it internationally, under the branding “People Make Glasgow”. Similar to Derry/Londonderry, Limerick is currently using its hosting of the National City of Culture 2014 to promote the city more positively from a number of angles, including investment and tourism.

Meath already has a number of brands – including “Ireland’s Heritage Capital”, “Meet in Meath” and Meath’s inextricable association with the Boyne Valley, one of Fáilte Ireland’s signature destinations. These county-wide brands are well-established and important due to the absence of any cities or large towns in the county (“Meath” or the “Boyne Valley” are likely to be stronger brands than any brands attaching to towns within the county, whereas in other locations, possibly Limerick and Sligo, and certainly Dublin, the urban centre tends to precede the county). In this regard, Meath is like Donegal, Mayo and Kerry (the county tends to have more profile than towns within it), whereas the likes of Galway and Cork have both successful county and city brands.

Meath’s existing brands appear to work and should be continued, whilst stressing its regional position, buttressed with further promotion of the county from inward investment and visitor perspectives.

Action 8: Building on recent initiatives to promote economic development in Meath, Meath County Council to lead on a series of complementary marketing initiatives aimed at building on and adding value to what has been achieved to date.

The following campaigns may be undertaken from the beginning of 2015 and followed up by referencing in subsequent years (2016-2022), with additional impetus campaigns to be considered on foot of the annual monitoring regarding the successful implementation of the Economic Development Strategy:

- Supplement on Meath in national newspaper – we recommend a leading ‘Sunday’, which in recent weeks has carried 2-page features on each of Limerick, Waterford and Galway, and which has been used in this context before and tends to be the key publication reaching the key business and policy audiences every week;
- 1-page supplement/special report in a national daily aimed particularly at commercial property and/or sites for employment development in Meath (this would be less of a priority than the latter proposal, partly for the reason that commercial properties and/or sites are advertised nationally from time to time by estate agents and auctioneers);
- Advertorial on the Economic Development Strategy for Meath in specialist publications having wide readership beyond, as well as within, the Irish local authority sector – this would help to raise the profile of the Strategy among key influencers and may facilitate subsequent local authority recognition of Meath’s initiatives through awards and recognition (although seeking awards should not be the goal of the Strategy – the goal is to help job creation in Meath);
- Interaction with IDA Ireland with the objective of ensuring that Meath is being covered fully by the agency in the same way as it promotes other locations – thus, the outputs of this part of the engagement with the IDA would include (a) infographic on Meath (produced by the IDA) and (b) ‘Connect and Invest – Meath’ on the IDA’s website (‘Connect Location’ is a new initiative by the IDA to promote regions) (IDA materials on Meath will have more power than own materials);
- Meath County Council sites marketing document (graphic design publication) (in addition to this would be proposed database of workspaces for all types of business);
- Meath business/investment brand development, which would include workshop/consultations and brand development (Meath’s existing brands should be maintained simultaneously);
- Bespoke video aimed at inward investment in Meath and targeted at IDA Ireland and prospective investors – this would be linked to the Meath County Council website on business and economic development;
- Public relations/affairs;
 - All PR handling
 - Interaction with government departments and agencies
 - Events and dinners – UK-Ireland, German-Ireland and US-Ireland Chambers
 - Diaspora mapping – Meath natives in international corporate and organisations etc.
 - Special events – e.g. National Ploughing Championships 2017?
- Ex-post (i.e. after report) road shows;
- Monitoring and tracking assistance.

Responsibility with the CEO of Meath County Council, the Director of Services (Economic Development) and the Economic Development Team at Meath County Council.

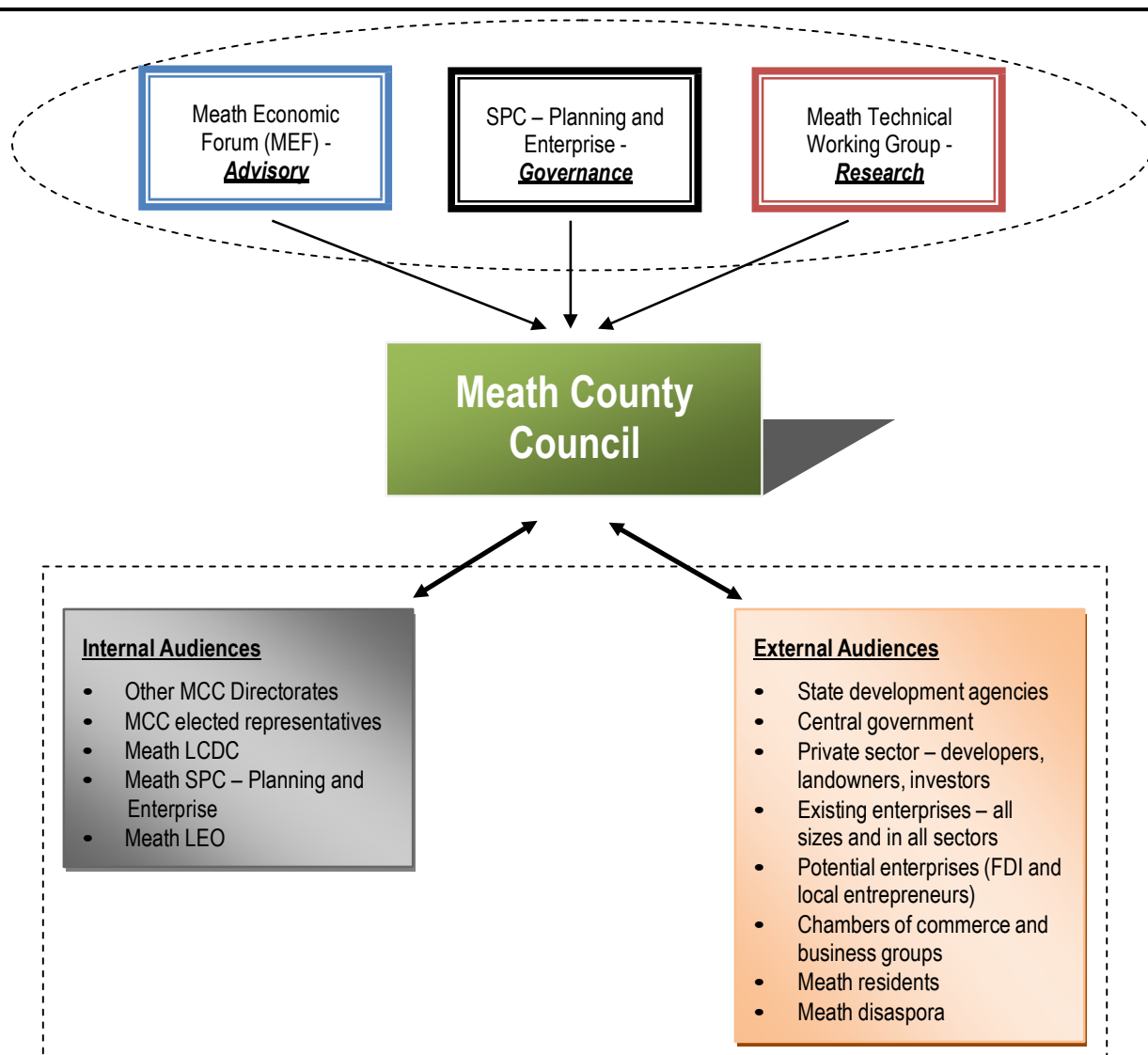
Commencement of this action from adoption of the Economic Development Strategy Report by Meath County Council.

9.6 Implementation and Monitoring of the Economic Development Strategy

Implementation

The plan to effectively implement the Economic Development Strategy is illustrated schematically in Figure 9.4. Meath County Council will play the leading role in implementation, with advisory inputs from the MEF and governance from the Meath SPC-Planning and Enterprise. The Meath Technical Working Group, which includes Meath LEO as well as senior representatives from the directorates of Meath County Council, will provide research support to the Economic Development Strategy. Shown in the lower part of the diagram are the internal and external audiences that the Council needs to interact with on an ongoing basis – through the Economic Development Team.

Figure 9.4: Implementation of the Economic Development Strategy for Meath 2014-2022



Source: Consultancy team review and analysis.

Performance Monitoring – Key Performance Indicators (KPIs)

The list of indicators that may be used to monitor performance regarding the implementation of the Economic Development Strategy is potentially vast. Priority therefore needs to be given to a small and manageable number of indicators for which independent data are available and we believe that the emphasis throughout needs to be put on employment.

Table 9.2 overleaf sets out a list of key performance indicators (KPIs) to track during the process. These are grouped under five strategic priorities:

- FDI;
- Indigenous enterprise development;
- Entrepreneurship;
- Tourism; and
- The Meath labour market.

The table specifies the particular variables that can be evidenced in each case, indicating their sources and making the comment that it will be necessary to construct a time series per indicator (from at least 2011), which can then be presented to assess performance with implementing the Strategy (including at meetings of the MEF). It will be seen from the indicators proposed in the table below that we are also recommending a *comparative* element to the KPIs – namely to assess Meath’s performance *relative* to other locations in the country.

Every meeting of the MEF, from adoption of the Economic Development Strategy, should have an agenda item in which progress with implementing the Strategy is considered – this should also include progress regarding the delivery of the identified sites, infrastructure and services etc. The meetings of the MEF should continue to be business-like and focused on outputs and tracking progress, and seeking to understanding any impediments or bottlenecks arising and how they can be alleviated.

Following the next censuses in 2016 and 2021, 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 (or its next incarnation) 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, including educational attainment, the rate of outbound commuting and sectoral shifts in the composition of employment in the county towards more knowledge-intensive activities (with the proviso that the 2016 review would need to be sensitive to the fact that the Strategy would be only two years in implementation).

Table 9.2: Performance Monitoring of the Economic Development Strategy for Meath 2014-2022

Strategic Priority	Key Performance Indicator (KPI)	KPI Periodicity	Comments
FDI	<ul style="list-style-type: none"> Permanent full-time employment in foreign-owned agency-assisted firms in Meath (and regionally and for State) Net jobs created or lost in foreign-owned agency-assisted firms in Meath (and in other counties) Number of IDA Ireland jobs announced in Meath (and regionally and for State) Number of IDA Ireland site visits in Meath (and other counties) Number of IDA Ireland inquiries re Meath 	<ul style="list-style-type: none"> Annual data available through special request from Forfás/DJEI Monthly, quarterly and/or annual data through special request from IDA Ireland (Dáil Q&As) Plus other information obtained regarding Meath County Council interaction with IDA Ireland and Dáil data on net jobs and IDA site visits 	<ul style="list-style-type: none"> Requirement will be to develop time series to review trends since 2011 or earlier and assess performance relative to those years and from commencement of the Strategy (2015)
Indigenous Enterprise Development	<ul style="list-style-type: none"> Permanent full-time employment in Irish-owned agency-assisted firms in Meath Net jobs created or lost in Irish-owned agency-assisted firms in Meath Number of EI jobs announced in Meath (and regionally and for State) and other initiatives (funding etc.) 	<ul style="list-style-type: none"> Annual data available through special request from Forfás/DJEI Monthly, quarterly and/or annual data through special request from Enterprise Ireland Plus other information obtained regarding Meath County Council interaction with EI and Dáil data on net jobs (Dáil Q&As) 	<ul style="list-style-type: none"> Requirement will be to develop time series to review trends since 2011 or earlier and assess performance relative to those years and from commencement of the Strategy (2015)
Entrepreneurship	<ul style="list-style-type: none"> Number of participants in Meath LEO training programmes Number of participants in Meath LEO management development programmes Number of participants in Meath LEO seminars and networking events Number of participants in Meath LEO mentoring programmes Number of Meath LEO clients supported by financial initiatives Number of full-time jobs in Meath LEO client firms Number of Meath LEO client firms proceeding to EI programmes 	<ul style="list-style-type: none"> Annual or more disaggregated (time-wise) data from Meath LEO (monthly and/or quarterly, depending on availability) This will be dependent on records and data maintained within Meath County Enterprise Board The proposed annual surveys of businesses (Action 3) will also be relevant to enhancing business support in Meath 	<ul style="list-style-type: none"> Requirement will be to interact with Meath LEO with the aim of constructing time series on each of the KPIs (and other relevant KPIs for which data may be available) This process will also require incorporating historical data from Meath CEB to derive trends
Tourism	<ul style="list-style-type: none"> Number of visitors to Meath – domestic and NI Number of visitors to Meath – overseas and by segment etc. Corresponding spending by visitors Visitor attractions Serviced accommodation 	<ul style="list-style-type: none"> Annual or more disaggregated (time-wise) data from Fáilte Ireland (monthly and/or quarterly) Interact with FI Assembly of data from other sources 	<ul style="list-style-type: none"> Requirement will be to develop series to review trends since 2011 or earlier and assess performance
Meath Labour Market	<ul style="list-style-type: none"> POWSCAR indicators on those working and living in Meath, inbound and outbound commuters in 2016 and 2021 Live Register trends on claimants 	<ul style="list-style-type: none"> The years in which the next POWSCAR data will become available will be 2016 and 2021 	<ul style="list-style-type: none"> Mid-term and final reviews of the Strategy in 2017 and 2022 respectively Educational attainment etc.

Source: Consultancy team review and analysis.

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 (which could possibly turn out to be even better than we have estimated);
- Sectoral shifts and opportunities in knowledge-intensive activities;
- Delivery of the identified sites and their promotion – including the IDA Business and Technology Parks in Navan and Drogheda, the Pace site in Dunboyne, Ashbourne and Kells etc.;
- The cooperation and support of the key enterprise development agencies (the IDA, EI and Fáilte Ireland) will be important to the success of the Strategy and this will rest upon Meath County Council taking the lead in approaching and interacting with the agencies);
- The response of the private sector, including landowners, property developers and investors, to the development opportunities highlighted in this report will be a key determinant of the success of the Strategy (this will in part be dependent on Meath County Council fostering a constructive relationship with this group of stakeholders, ensuring sustainable development);
- 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).

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) politically-driven decisions rather than economic in the run-up to the next General Election; (b) lagging European economic performance; (c) escalation of the geo-political tensions in the Middle East and Ukraine, 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);²³⁰
- *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 variation process and/or personnel within Meath County Council resist the challenge of necessary change.

²³⁰ While Ireland's 12.5% corporation tax will not be affected, the tax regime in the EU and between the US and US companies with overseas operations is expected to change, and this will have implications for FDI in Ireland (and other countries). Ireland will have to focus on things over which it can exercise control – costs, prices and competitiveness – and Meath needs to think like this as well (sites, services, skills and local costs etc.).

9.7 Tabular Summary of the Proposed Actions

The actions outlined above are tabulated in the next three tables – Economic, Spatial and Marketing.

Table 9.3: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – Economic and Overall Strategic Actions

Action	Responsibility and Commencement
<i>Internal Audience Engagement</i>	
1. Adoption, dissemination and practice of the Economic Development Strategy for County Meath 2012-2022 at all levels within and across Meath County Council, including among elected representatives as well as officials of the Council.	Responsibility with the CEO and Directors of Services at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
<i>External Audience Engagement</i>	
2. Proactive engagement between Meath County Council and the State agencies – IDA Ireland (FDI), Enterprise Ireland (indigenous businesses) and Fáilte Ireland (tourism), and with Meath LEO (local entrepreneurship and SMEs). The Council should also proactively engage with higher education institutions (HEIs) (including Dundalk Institute of Technology as well as Maynooth University) and other business support agencies (e.g. Meath Partnership). There should also be engagement with the DECLG and national planning authorities in delivery of the identified sites.	Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
3. Constructive engagement between Meath County Council and businesses (including developers/landowners). Fundamental to this action is to ensure that officials continually think about how best the Council can serve businesses and wealth creators, who have the capacity to help deliver the identified sites and create jobs.	Responsibility with the CEO, Director of Services (Economic Development) and the Economic Development Team at Meath County Council. Commencement from adoption of the Economic Development Strategy by Meath County Council.
<i>Key Economic Activities and their Potential by Employment</i>	
4. Promotion of the hierarchy of economic centres and targeted sectors in Meath with the objective of facilitating significant new enterprise employment in Meath (map shown earlier).	Responsibility with the CEO of Meath County Council and the Economic Development Team within the Council working in partnership with relevant senior personnel within IDA Ireland in regard to FDI. Commencement from adoption of the Economic Development Strategy by Meath County Council.

Source: Development Strategy Report for County Meath 2014-2022.

Table 9.4: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – Spatial Implementation Actions

Action	Responsibility and Commencement
Infrastructure and Services on the Identified Sites for Employment Generation	
5. Meath County Council to undertake an assessment of the available infrastructure and services on all of the identified sites with employment potential, in conjunction with the relevant landowners, the goal being to complete the proposed site services matrix and to plan for how best to address any deficiencies identified through framework plans.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>
Delivery of the Identified Sites for Employment Generation	
6. Meath County Council to consider the possibility of facilitating the development of a Rural Economic Development Zone (REDZ) in the County.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>
7. Meath County Council to consider the possibility of financial incentives designed to aid the delivery of the identified sites for employment generation.	<p>Responsibility with the CEO of Meath County Council and the Directors of Services (Economic Development and Other) at Meath County Council.</p> <p>Commencement from adoption of the Economic Development Strategy by Meath County Council.</p>

Source: Development Strategy Report for County Meath 2014-2022.

Table 9.5: Summary of Actions for the Economic Development Strategy for County Meath 2014-2022 – Marketing Actions to Promote Economic Development in Meath to Multiple Audiences

Action	Responsibility and Commencement
8. Building on recent initiatives to promote economic development in Meath, Meath County Council to lead on a series of complementary marketing initiatives aimed at building on and adding value to what has been achieved to date.	<p>Responsibility with the CEO of Meath County Council, the Director of Services (Economic Development) and the Economic Development Team at Meath County Council.</p> <p>Commencement of this action from adoption of the Economic Development Strategy Report by Meath County Council.</p>

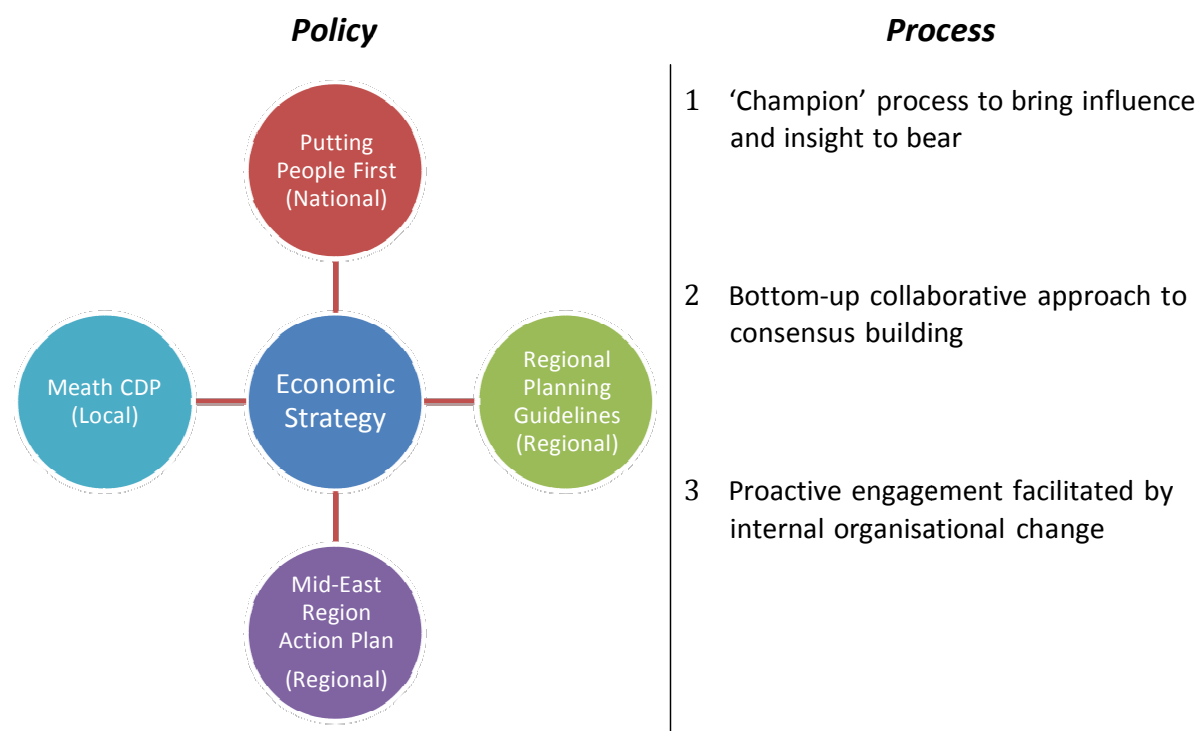
Source: Development Strategy Report for County Meath 2014-2022.

10 Concluding Remarks

The consultancy team commends this carefully prepared and evidence-based Economic Development Strategy for County Meath 2014-2022 to Meath County Council. The plan-led Strategy, if followed through in full, has the potential to deliver significant economic development and jobs for the county in the coming years, reflecting Meath's relative economic strengths and opportunities. The next phase in the process will be implementation and regular monitoring of the Strategy, to be appraised by Meath County Council, the Meath Economic Forum, and the Meath SPC – Planning and Enterprise.

The following schematic summarises the overall approach to constructing the Strategy in terms of the *policy* environment and the *process* involved in its implementation.

Figure 10.1: Schematic Illustration of Approach to the Economic Development Strategy for Meath



Source: Meath County Council, consultancy team review.

Box A1: Examples of Local Authority Direct Role in Promoting Economic Development

- Liaison with business on relevant issues and developments including engagement with CEOs of key enterprises on potential to promote further economic activity;
- Making available data and analysis on local economic conditions, resources, issues and trends, including provision of information of interest to potential investors;
- Marketing and promoting the area as a location for investment, enterprise, economic activity and tourism;
- Continued development of facilities such as business parks, incubation units, and tourism attraction projects
- Organising or facilitating relevant events or structures;
- Extending existing examples of innovative approaches to business support by some local authorities;
- Harnessing the strengths generally of local authorities in terms of local knowledge and proximity to local communities to promote/market the area as a location for investment and enterprise;
- Supporting research and innovation at a local level;
- Assisting businesses in accessing relevant agencies and extension of initiatives taken by some authorities to reduce business costs, for example in relation to water and energy costs.

Source: Putting People First (supra footnote 2) (Appendix 1 of that document).

Note: This list informs in part the synthetic list of local authority actions/functions to support economic development provided in Box 2.2 (p. 16).

Box A2: Traditional ‘Mainstream’ Local Government Functions Relevant to Economic Development

- Providing an effective ‘one-stop-shop’ interface for the needs of businesses and investors, whether at agency assisted (i.e. all firms supported by IDA and Enterprise Ireland, etc), indigenous or micro-enterprise levels, in respect of the full range of local authority services and functions
- Arrangements to engage effectively with local business, relevant local or national agencies and potential investors, with particular emphasis on responding effectively and promptly to major enterprise/investment proposals both in terms of regulatory requirements (for example in the areas of planning and environmental requirements) and acting to support and facilitate such proposals, as appropriate, for example in the context of infrastructure or relevant services such as water or roads
- Proactive measures to enhance the attractiveness and quality of life of cities, towns and their environs as places to live, work, visit and do business, including environmental protection and enhancement, physical improvements, streetscape and village renewal schemes, and development of recreational, cultural, tourist and heritage facilities
- Continued prioritisation of business and employment considerations in setting commercial rates and flexible payment options and arrangements; reduced rates of development contributions or waivers in certain circumstances under revised Development Contribution Guidelines
- Measures to facilitate and support local enterprise (especially SME) engagement in public sector procurement processes and planning and implementation of green public procurement
- Subject to the need to ensure that measures in the *Green Tenders – An Action Plan on Green Public Procurement* must be no less economic than alternative traditional procurement, local authorities will assist in the implementation of green public procurement
- Providing a consultative mechanism to facilitate economic input to the drafting of the Development Plan and monitoring implementation of the economic components of the plan
- Identification of local infrastructure need (e.g. transport, water), and its planning and provision directly, or support for its provision by other responsible agencies
- Protection of landscape and environmental assets to support tourism
- A continued commitment, where possible, to reduce or freeze commercial rates and other charges to business
- Rebalancing local development contributions in line with revised Development Contribution Guidelines
- Improving capacity for resource efficiency and waste reduction through the Local Authority Waste Prevention Network and working with business to identify and implement other behavioural changes that reduce their costs
- Improving local quality of life, through heritage protection, support and promotion of the arts, cultural activities, etc all of which are essential to the maintenance of an attractive place to live, visit and do business

Source: Putting People First (supra footnote 2) (Appendix 1 of that document).

Note: This list informs in part the synthetic list of local authority actions/functions to support economic development provided in Box 2.2 (p. 16).

Box A3: Local Authority Leadership, Co-ordination and Mobilisation of Economic Development Efforts

- Promoting and facilitating linkage, networking, partnerships and information sharing between enterprises and sectors (e.g. through Business Users Fora) to identify issues and potential and develop synergy
- Promoting co-ordination among development agencies and with other relevant bodies such as educational institutions, and bringing a local focus to their activities so as to address deficiencies, address problems or capitalise on particular strengths and opportunities in the area
- Identifying any possible gaps in the work of the development agencies and requirements to address them
- Mobilising action to revitalise locations experiencing economic decline, including identification of potential key economic activities to generate growth (for example, through initiatives such as the formulation of an Economic Development and Spatial Implementation Plan in Limerick)
- Supporting inter-agency task forces responding to significant issues (e.g. closure of major businesses or development of specific economic initiatives)
- Bringing to the attention of central government any issues requiring action at that level.

Source: Putting People First (supra footnote 2) (Appendix 1 of that document).

Note: This list informs in part the synthetic list of local authority actions/functions to support economic development provided in Box 2.2 (p. 16).

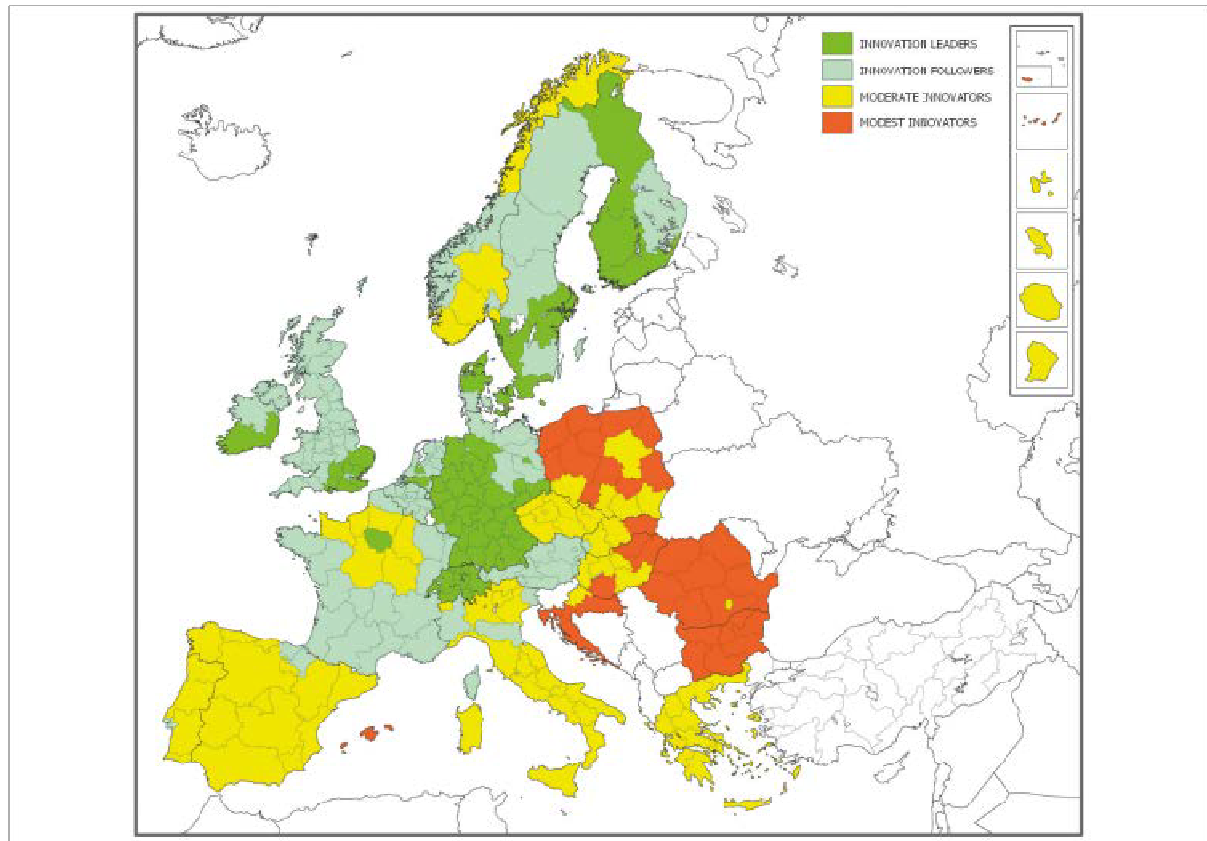
Table A1: Number of IDA Ireland Site Visits with Potential FDI Firms in Irish Counties (2008-2012)

County	IDA Ireland Site Visits with Potential Investors				
	2008	2009	2010	2011	2012
Carlow	1	1	3	2	4
Cavan	1	0	3	0	3
Clare	2	9	7	15	14
Cork	41	29	44	27	38
Donegal	3	3	4	2	1
Dublin	92	90	197	150	196
Galway	14	22	41	35	18
Kerry	4	3	2	2	1
Kildare	1	1	2	3	1
Kilkenny	1	2	0	0	3
Laois	6	1	0	2	0
Leitrim	0	0	0	0	0
Limerick	9	18	38	40	30
Longford	1	0	0	0	0
Louth	23	28	25	26	12
Mayo	3	1	1	0	1
Meath	3	2	0	2	0
Monaghan	0	0	0	1	0
Offaly	11	6	7	1	3
Roscommon	0	0	0	0	0
Sligo	2	5	12	3	6
Tipperary	0	1	1	1	5
Waterford	12	8	11	11	26
Westmeath	18	14	22	15	7
Wexford	0	0	1	0	3
Wicklow	2	2	5	3	6
State	250	246	426	341	378
Meath share	1%	1%	0%	1%	0%
Dublin share	37%	37%	46%	44%	52%

Source: Dáil Questions, Written Answer (19 November 2013, Ref. No. 49356/13); consultancy team analysis.

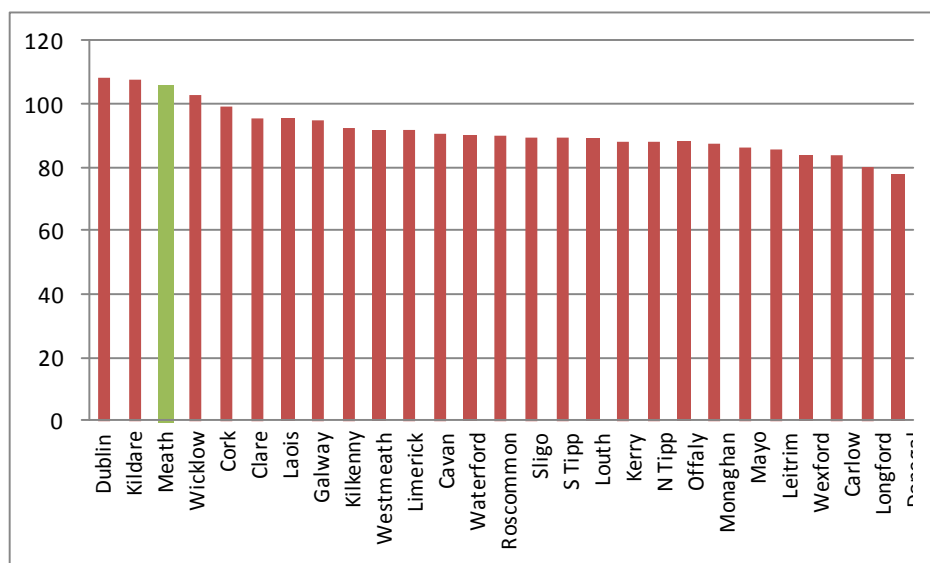
Note: The data are maintained by IDA Ireland.

Figure A2: Map of Regional Innovation Performance in Europe (2010)



Source: Regional Innovation Scoreboard 2014, European Commission.

Figure A3: Ratio of Primary Income to Disposable Income in Meath and Other Irish Counties (2011)



Source: CSO (supra footnote 119), consultancy team analysis.

Figure A4: Trends in Self-Employed Income in Meath and the State (2000-2011) (2000 Base Year=100)



Source: CSO (supra footnote 119), consultancy team analysis.

Table A2: Employment and Unemployment Performance in County Meath and Selected Other Parts of Ireland (2006-2011)

	Meath			Dublin			Mid-East			State		
	2006	2011	% Change	2006	2011	% Change	2006	2011	% Change	2006	2011	% Change
Total at work	78,437	74,342	-5.2%	572,896	540,729	-5.6%	227,344	212,836	-6.4%	1,930,042	1,807,360	-6.4%
Unemployed - looking for first regular job	846	1,137	34.4%	9,355	10,678	14.1%	2,587	3,297	27.4%	29,372	34,166	16.3%
Unemployed - having lost or given up previous job	4,637	15,155	226.8%	46,750	100,771	115.6%	14,077	44,308	214.8%	150,084	390,677	160.3%
Total in labour force	83,920	90,634	8.0%	629,001	652,178	3.7%	244,008	260,441	6.7%	2,109,498	2,232,203	5.8%
Employment rate	93.5%	82.0%	-12.2%	91.1%	82.9%	-9.0%	93.2%	81.7%	-12.3%	91.5%	81.0%	-11.5%

Source: CSO Censuses 2006 and 2011, consultancy team analysis.

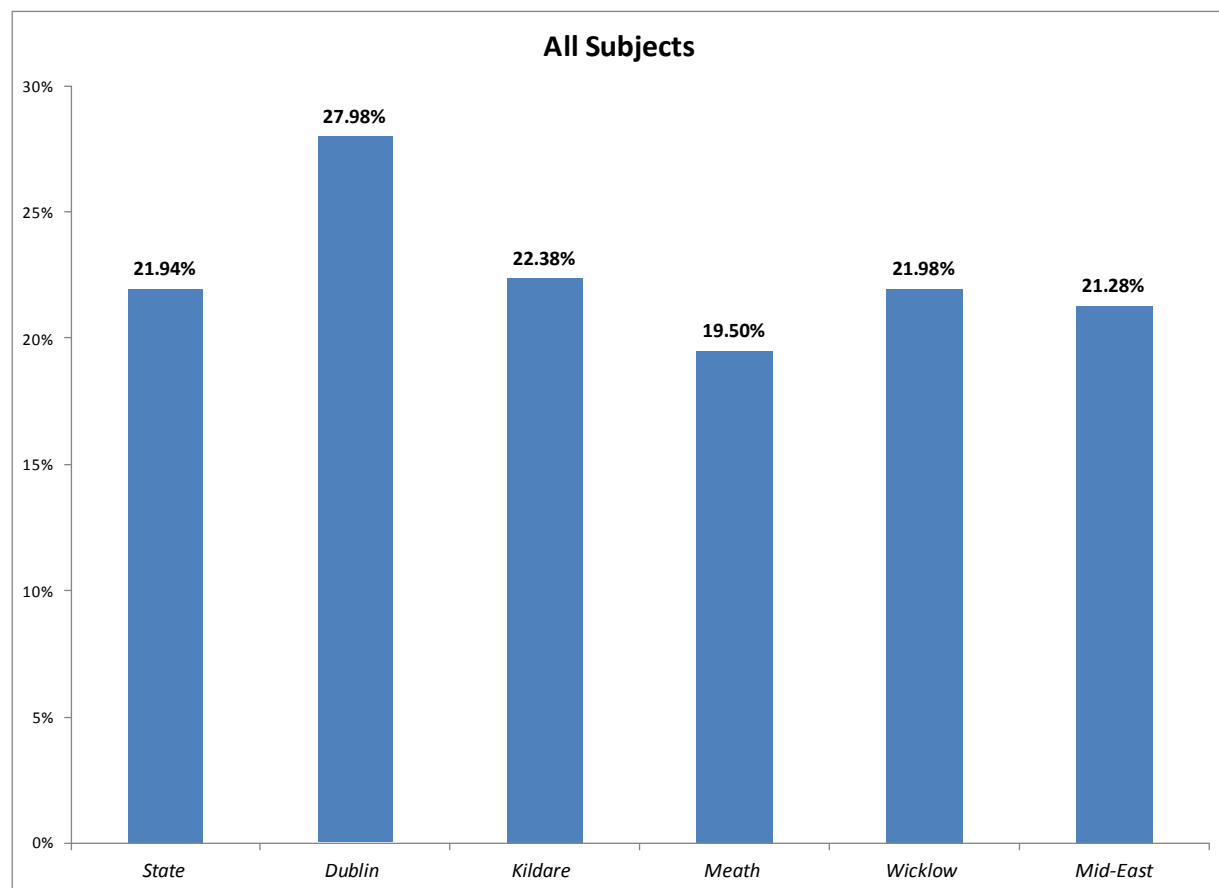
Note: Persons aged 15 years and more.

Figure A5: Chart Illustrating the National Framework of Qualifications



Source: <http://www.nfq.ie/nfq/en/learner.html>.

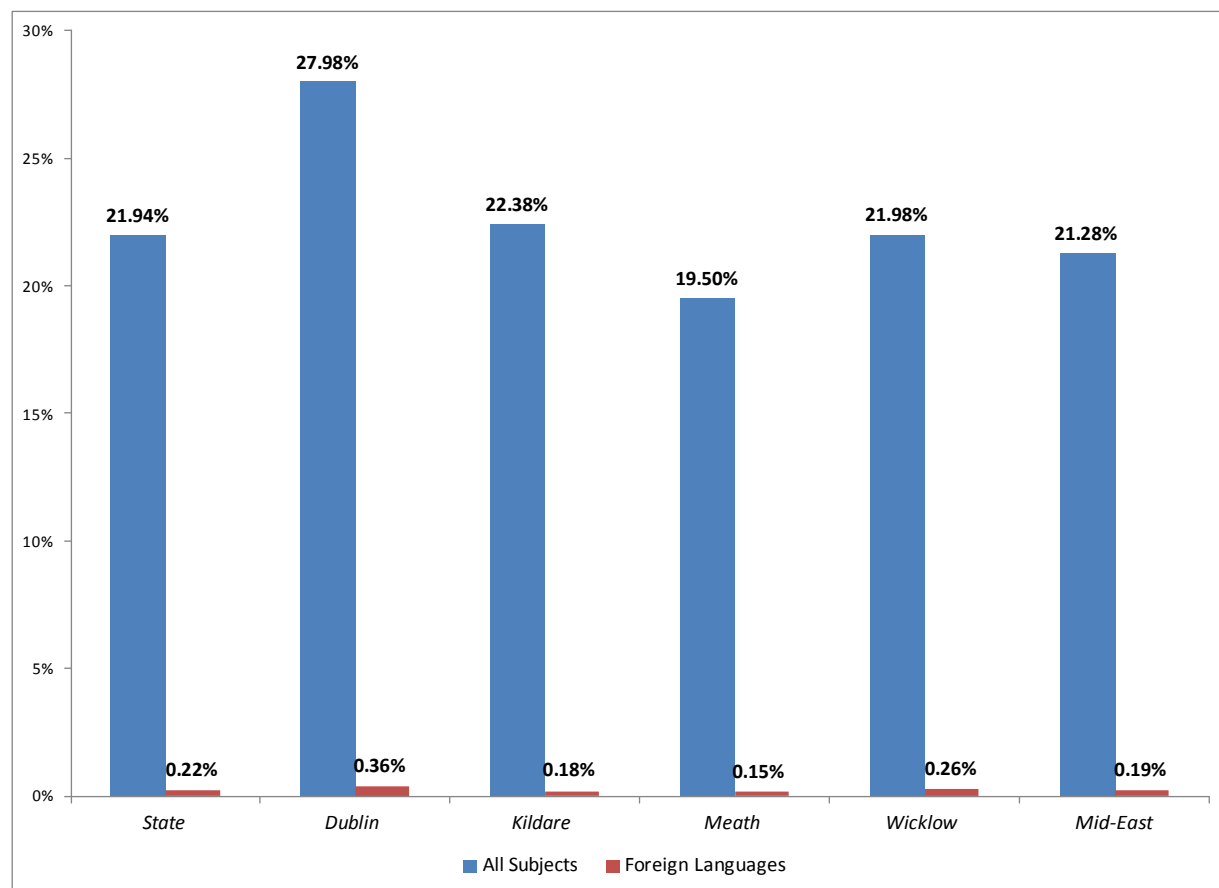
Figure A6: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Subject Areas



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.9 (p. 114) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

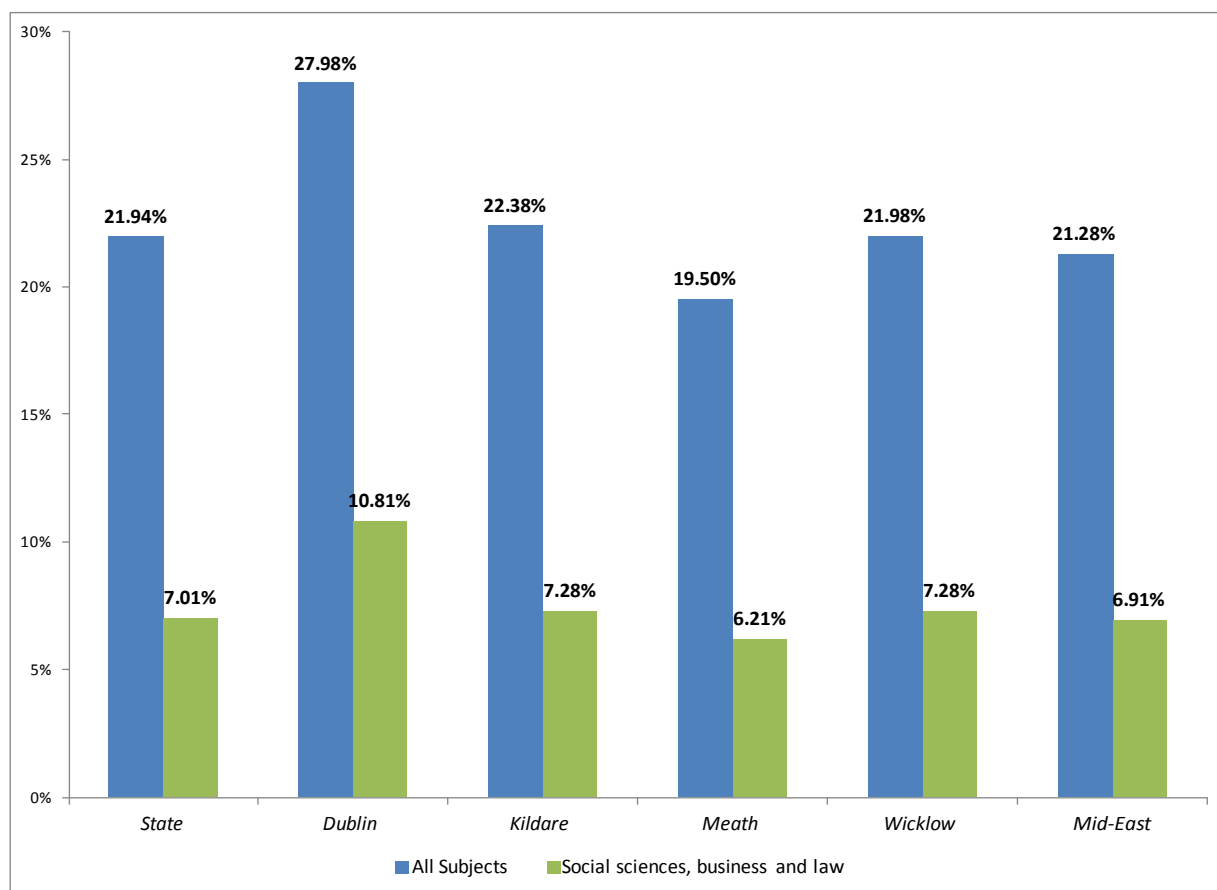
Figure A7: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Foreign Languages



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.10 (p. 115) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

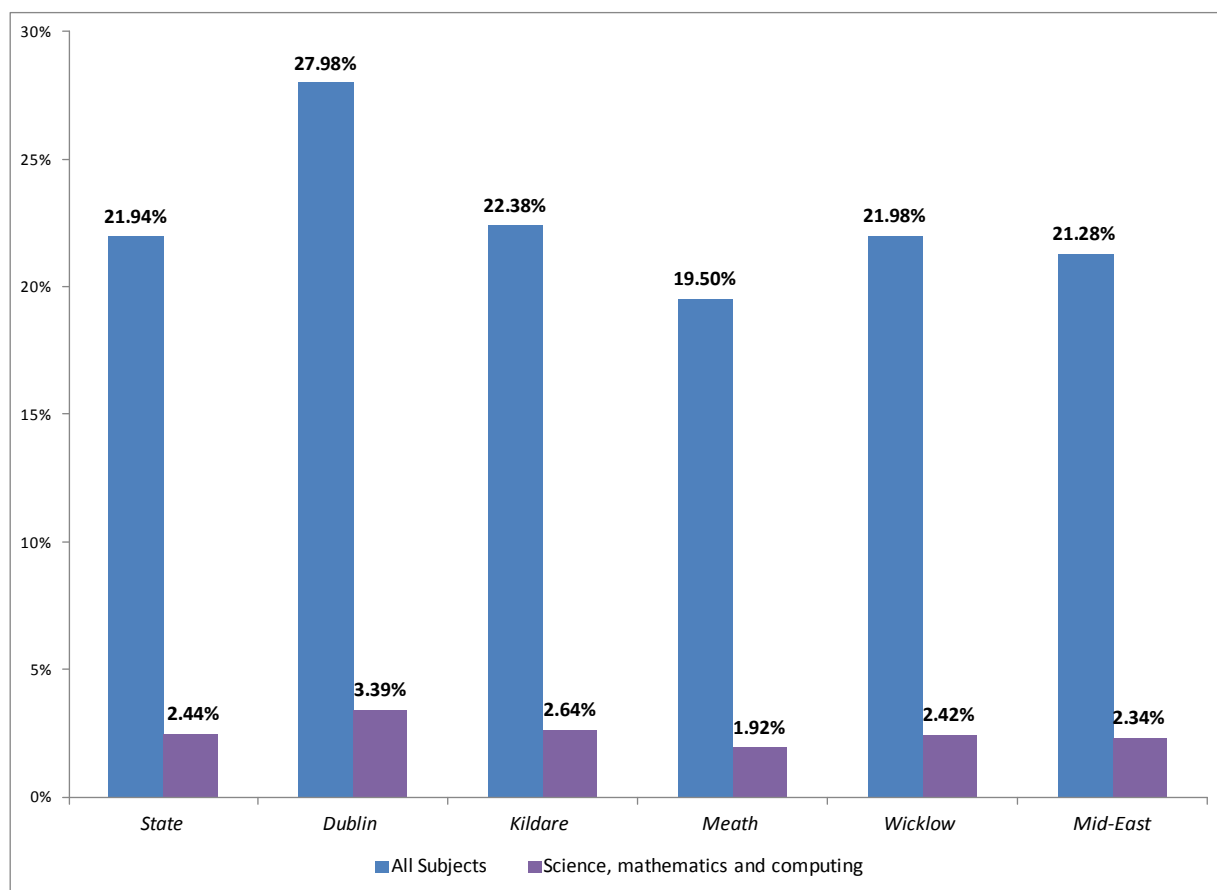
Figure A8: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Social Sciences, Business and Law



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.11 (p. 116) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

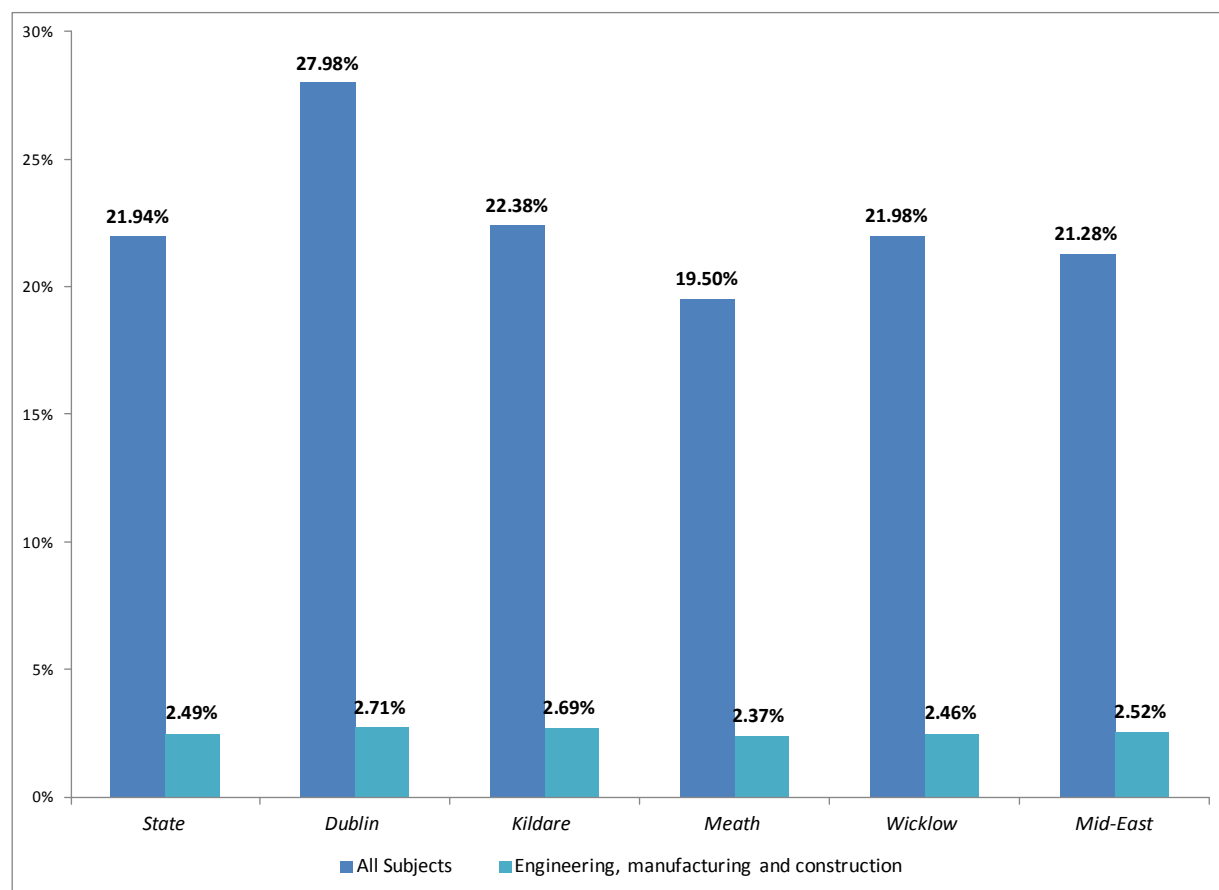
Figure A9: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Sciences, Mathematics and Computing



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.12 (p. 117) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

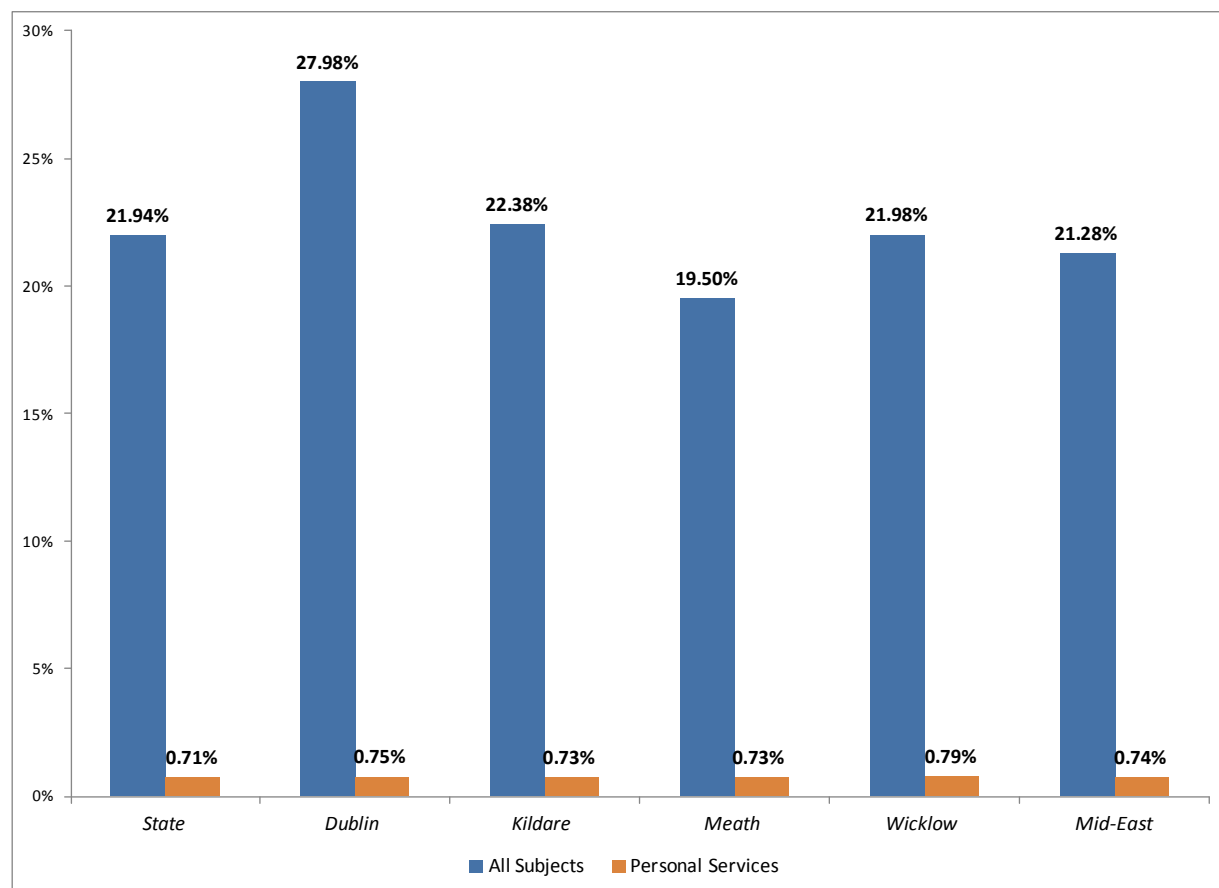
Figure A10: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Engineering, Manufacturing and Construction



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.13 (p. 118) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

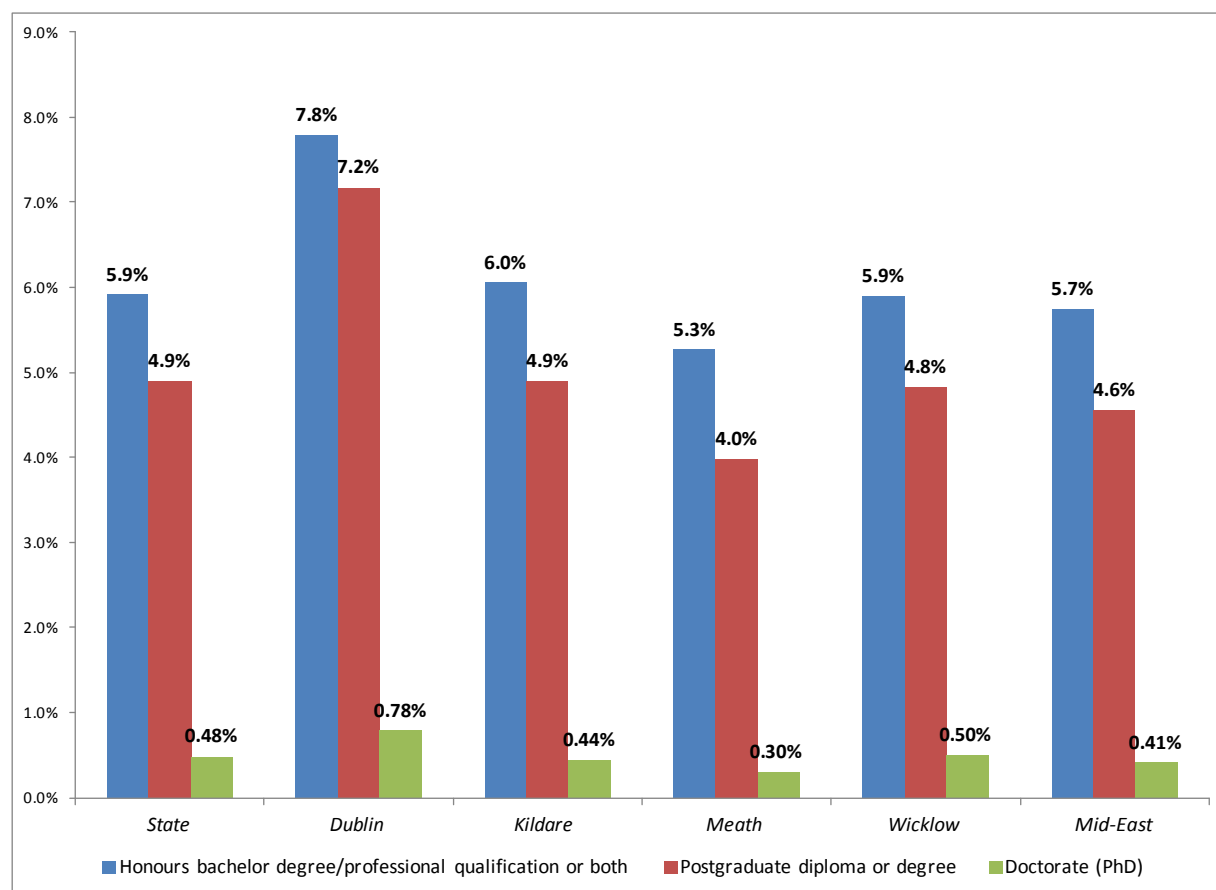
Figure A11: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – All Key Subject Areas and Personal Services



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.14 (p. 119) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

Figure A12: Proportion of All Residents in County Meath and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications (2011) – Level of Third-Level Qualifications



Source: CSO Census 2011 data, consultancy team analysis.

Note: See Figure 7.15 (p. 120) for the corresponding graph where the denominator is all residents aged 15 years and above in each location.

Note: Supra footnote 143 for the HEI abbreviations. In addition, the following abbreviations are used here: QUB (Queen's University Belfast), UU (University of

Table A4: Serviced Accommodation in Meath (2013) – Hotel Beds

Hotel Beds	Meath	% of Total	State	% of Total	Meath % of State
5*	0	0.0%	8,196	6.1%	0.0%
4*	465	63.2%	59,591	44.3%	0.8%
3*	205	27.9%	59,773	44.4%	0.3%
2*	66	9.0%	6,003	4.5%	1.1%
1*	0	0.0%	937	0.7%	0.0%
Total	736	100.0%	0 134,500	100.0%	0.5%

Source: Fáilte Ireland, consultancy team analysis.

Note: A summary of Meath's hotel and guesthouse/B&B accommodation relative to that of the country as a whole is given in Table 7.35 (p. 162).

Table A5: Serviced Accommodation in Meath (2013) – Guesthouse and B&B Beds

Guesthouse and B&B Beds	Meath	% of Total	State	% of Total	Meath % of State
Guesthouses	208	52.9%	6,767	28.8%	3.1%
B&Bs	185	47.1%	16,744	71.2%	1.1%
Total	393	100.0%	23,511	100.0%	1.7%

Source: Fáilte Ireland, consultancy team analysis.

Note: A summary of Meath's hotel and guesthouse/B&B accommodation relative to that of the country as a whole is given in Table 7.35 (p. 162).

Table A6: Further Details on the Employment in the Category of National Strengths and Convergence Opportunities Sectors in Ireland (2007-2012)

Category and Sector (NACE)	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007-2012)	(2010-2012)	(2011-2012)
Strengths and Convergence Opportunities									
Agri-food	168,987	169,475	143,372	134,910	132,712	134,755	-4.4%	-0.1%	1.5%
Primary	112,163	112,511	96,184	89,876	82,372	85,563	-5.3%	-2.4%	3.9%
Farming (1)	107,629	108,695	91,624	82,980	78,364	81,420	-5.4%	-0.9%	3.9%
Forestry (2)	2,223	1,776	2,521	3,513	2,186	2,268	0.4%	-19.6%	3.8%
Fishing (3)	2,311	2,040	2,039	3,384	1,822	1,875	-4.1%	-25.6%	2.9%
Secondary	56,824	56,964	47,188	45,033	50,341	49,192	-2.8%	4.5%	-2.3%
Food products (10)	49,095	51,370	41,143	38,929	44,560	43,537	-2.4%	5.8%	-2.3%
Beverages (11)	7,348	5,403	5,974	6,043	5,706	5,422	-5.9%	-5.3%	-5.0%
Tobacco (12)	381	192	71	62	74	233	-9.4%	94.4%	212.8%
ICT	97,060	103,368	102,267	102,005	101,469	103,414	1.3%	0.7%	1.9%
Hardware/manufacturing	29,621	31,645	28,322	26,226	24,388	25,220	-3.2%	-1.9%	3.4%
Computer/electronic manufacture (26)	29,621	31,645	28,322	26,226	24,388	25,220	-3.2%	-1.9%	3.4%
Software/services	67,439	71,723	73,945	75,779	77,081	78,194	3.0%	1.6%	1.4%
Publishing activities (58)	5,030	5,213	5,485	3,643	4,558	3,189	-8.7%	-6.4%	-30.0%
Movie, TV and film production (59)	3,254	2,399	2,678	3,594	4,811	3,579	1.9%	-0.2%	-25.6%
Broadcasting (60)	3,964	3,435	3,908	4,656	4,563	5,085	5.1%	4.5%	11.4%
Telecommunications (61)	20,438	22,090	21,452	20,205	21,031	18,459	-2.0%	-4.4%	-12.2%
Computer programming & consultancy (62)	31,054	33,758	34,630	38,801	35,949	41,813	6.1%	3.8%	16.3%
Information services (63)	3,698	4,827	5,792	4,879	6,168	6,069	10.4%	11.5%	-1.6%
Medical technologies	23,835	23,264	23,457	23,148	24,405	25,475	1.3%	4.9%	4.4%
Medical and dental instruments and supplies	23,835	23,264	23,457	23,148	24,405	25,475	1.3%	4.9%	4.4%
Pharma-chem	36,060	33,376	33,641	36,652	32,674	34,020	-1.2%	-3.7%	4.1%
Coke and petrol (19)	412	282	711	641	561	367	-2.3%	-24.4%	-34.6%
Chemical products (20)	3,167	3,134	2,835	3,363	2,724	3,059	-0.7%	-4.6%	12.3%
Basic pharmaceuticals (21)	32,481	29,960	30,095	32,648	29,390	30,594	-1.2%	-3.2%	4.1%
Internationally-traded services	40,712	43,196	40,717	41,047	45,100	46,604	2.7%	6.6%	3.3%
Financial services	21,020	22,183	21,225	21,389	22,685	23,257	2.0%	4.3%	2.5%
Business services	19,692	21,013	19,492	19,658	22,415	23,347	3.5%	9.0%	4.2%
Sub-Total	366,654	372,679	343,454	337,761	336,360	344,268	-1.3%	1.0%	2.4%
Category % of Total QNHS Employment	17%	17%	18%	18%	18%	19%	2.0%	2.2%	2.6%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes are shown in parentheses (QNHS data). Medical technologies and internationally-traded services make use of Forfás AES/ABSEI data. The corresponding summary table in the main body of the report is Table 8.7 (p. 185).

Table A7: Further Details on the Employment in the Emerging Opportunities and Untapped Potential Sectors (2007-2012)

Category and Sector (NACE)	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007- 2012)	(2010- 2012)	(2011- 2012)
Emerging Opportunities and Untapped Potential									
Green and cleantech	25,743	26,207	24,296	22,862	23,293	18,032	-6.9%	-11.2%	-22.6%
Electricity and gas (35)	11,242	12,335	11,882	10,806	10,593	8,744	-4.9%	-10.0%	-17.5%
Energy (ABSEI data)	61	91	165	304	303	N/a	Low base growth		
Water (36)	2,499	2,253	2,430	1,970	2,967	1,755	-6.8%	-5.6%	-40.9%
Sewage (37)	466	573	343	340	444	142	-21.1%	-35.4%	-68.0%
Waste (38)	11,537	11,047	9,640	9,746	9,289	7,391	-8.5%	-12.9%	-20.4%
Recycling and waste (ABSEI data)	1,537	1,676	2,088	2,353	2,537	N/a	Low base growth		
Arts, entertainment and recreation	53,366	61,592	55,380	58,480	56,306	59,005	2.0%	0.4%	4.8%
Arts and Entertainment (90)	11,867	15,238	12,055	15,559	11,546	13,051	1.9%	-8.4%	13.0%
Libraries and museums (91)	3,713	3,623	3,817	4,392	3,454	3,780	0.4%	-7.2%	9.4%
Gambling (92)	4,185	6,436	4,177	3,977	4,512	6,547	9.4%	28.3%	45.1%
Sports and recreation (93)	19,615	23,124	20,880	21,783	21,783	18,793	-0.9%	-7.1%	-13.7%
Membership organisations (94)	13,987	13,171	14,451	12,770	15,011	16,835	3.8%	14.8%	12.1%
Education	133,729	139,568	139,410	148,983	137,228	140,605	1.0%	-2.9%	2.5%
Sub-Total	212,839	227,367	219,086	230,325	216,827	217,641	0.4%	-2.8%	0.4%
Category % of Total QNHS Employment	10%	11%	11%	12%	12%	12%	3.8%	-1.6%	0.6%

Source: CSO QNHS data; consultancy team review and analysis.

Note: NACE codes are shown in parentheses (QNHS data). Leather and footwear excluded due to incomplete data but tiny contribution (c. 90 jobs in Q2 2012). The corresponding summary table in the main body of the report is Table 8.9 (p. 188).

Annex: Supplementary Information

Table A8: Further Details on the Employment in the Category of Mature Sectors in Ireland (2007-2012)

Category and Sector (NACE)	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007-2012)	(2010-2012)	(2011-2012)
Mature Sectors									
Engineering/manufacturing	149,049	136,330	115,209	106,357	101,734	97,314	-8.2%	-4.3%	-4.3%
Textiles (13)	4,198	4,811	2,966	2,332	1,788	2,651	-8.8%	6.6%	48.3%
Clothing (14)	4,039	4,683	3,425	4,303	2,735	2,838	-6.8%	-18.8%	3.8%
Wood products (16)	10,336	8,329	6,872	6,283	4,975	4,251	-16.3%	-17.7%	-14.6%
Paper products (17)	3,146	3,169	2,908	2,664	2,203	2,084	-7.9%	-11.5%	-5.4%
Recorded media (18)	11,798	9,002	8,319	7,295	7,431	6,681	-10.8%	-4.3%	-10.1%
Rubber and plastics (22)	7,820	7,037	5,022	5,252	5,515	5,204	-7.8%	-0.5%	-5.6%
Non-metallic minerals (23)	15,141	11,455	9,189	6,397	6,974	6,442	-15.7%	0.4%	-7.6%
Basic metals (24)	4,733	4,835	2,509	1,841	4,116	3,418	-6.3%	36.3%	-17.0%
Fabricated metal products (25)	25,747	26,204	18,457	15,486	13,432	12,047	-14.1%	-11.8%	-10.3%
Electrical equipment (27)	1,623	2,138	1,811	1,844	2,535	1,414	-2.7%	-12.4%	-44.2%
Machinery and equipment (28)	29,755	27,382	29,594	28,152	29,156	29,092	-0.4%	1.7%	-0.2%
Motor vehicle manufacture (29)	5,645	4,303	3,898	3,872	3,789	3,498	-9.1%	-5.0%	-7.7%
Other transport equipment (30)	318	398	122	78	78	208	-8.1%	63.9%	168.5%
Furniture (31)	8,599	8,566	6,099	5,871	4,757	3,543	-16.2%	-22.3%	-25.5%
Other manufacturing (32)	10,423	8,386	8,022	10,213	8,053	8,178	-4.7%	-10.5%	1.6%
Machinery repair (33)	5,728	5,632	5,997	4,474	4,196	5,764	0.1%	13.5%	37.4%
Tourism and hospitality	147,081	142,358	137,827	135,623	128,178	131,594	-2.2%	-1.5%	2.7%
Accommodation (55)	55,386	52,281	49,829	50,195	43,287	50,062	-2.0%	-0.1%	15.7%
Food and beverage service activities (56)	83,580	83,262	80,698	78,753	77,819	73,017	-2.7%	-3.7%	-6.2%
Travel agency services (79)	8,115	6,815	7,300	6,675	7,073	8,515	1.0%	12.9%	20.4%
Retail and wholesale	310,920	309,903	279,034	278,075	276,504	272,709	-2.6%	-1.0%	-1.4%
Motor vehicle repair (45)	41,580	40,556	34,406	36,622	35,693	33,500	-4.2%	-4.4%	-6.1%
Wholesale trade (46)	62,415	65,052	48,597	53,065	50,421	51,983	-3.6%	-1.0%	3.1%
Retail trade (46)	206,925	204,295	196,031	188,388	190,390	187,225	-2.0%	-0.3%	-1.7%
Transport, logistics and distribution	92,828	95,912	97,332	92,823	96,667	90,328	-0.5%	-1.4%	-6.6%
Land transport (49)	52,023	54,408	52,759	49,579	52,101	47,044	-2.0%	-2.6%	-9.7%
Water transport (50)	2,497	1,739	2,584	2,457	1,762	1,487	-9.8%	-22.2%	-15.6%
Air transport (51)	7,053	7,378	9,577	10,717	8,969	8,415	3.6%	-11.4%	-6.2%
Warehousing and transport support (52)	14,162	14,545	15,178	13,128	14,655	14,894	1.0%	6.5%	1.6%
Postal services (53)	17,093	17,843	17,234	16,943	19,181	18,488	1.6%	4.5%	-3.6%
Property and construction	371,834	330,992	236,011	188,343	186,538	177,687	-13.7%	-2.9%	-4.7%
Construction of buildings (41)	130,543	110,518	70,555	51,092	46,050	44,494	-19.4%	-6.7%	-3.4%
Civil engineering (42)	9,236	9,224	7,496	5,149	7,847	6,091	-8.0%	8.8%	-22.4%
Specialised construction (43)	131,033	116,035	75,312	59,670	54,594	50,493	-17.4%	-8.0%	-7.5%
Real estate (68)	12,048	11,013	8,926	9,733	9,213	9,416	-4.8%	-1.6%	2.2%
Architecture (71)	37,032	33,666	30,982	23,552	25,719	28,615	-5.0%	10.2%	11.3%
Renting and leasing activities (77)	9,925	7,976	5,503	6,410	5,092	4,709	-13.9%	-14.3%	-7.5%
Security services (80)	14,082	12,371	12,144	9,240	9,595	10,229	-6.2%	5.2%	6.6%
Services to buildings/landscaping (81)	27,937	30,189	25,093	23,495	28,428	23,641	-3.3%	0.3%	-16.8%
Sub-Total	1,071,713	1,015,495	865,413	801,220	789,621	769,632	-6.4%	-2.0%	-2.5%
Category % of Total QNHS Employment	49%	48%	44%	42%	43%	42%	-3.3%	-0.8%	-2.3%

Source: CSO QNHS data; consultancy team review and analysis.

Note: NACE codes are shown in parentheses (QNHS data). Leather and footwear excluded due to incomplete data but tiny contribution (c. 90 jobs in Q2 2012). The corresponding summary table in the main body of the report is Table 8.10 (p. 190).

Table A9: Further Details on the Employment in the Domestically/Locally-Traded Sectors in Ireland (2007-2012)

Category and Sector (NACE)	Total Employment (Persons aged 15 years and over, Q3 each year, 000)						CAGR	CAGR	CAGR
	2007	2008	2009	2010	2011	2012	(2007-2012)	(2010-2012)	(2011-2012)
Domestically/Locally-Traded Services									
Professional/business	263,664	258,832	253,830	244,150	234,265	237,263	-2.1%	-1.4%	1.3%
Finance (except insurance and pensions) (64)	45,265	42,476	47,287	40,067	39,606	43,622	-0.7%	4.3%	10.1%
Insurance and pensions (65)	19,093	22,654	22,898	20,384	19,324	18,472	-0.7%	-4.8%	-4.4%
Auxiliary financial services (66)	9,168	7,847	8,540	9,024	8,309	7,510	-3.9%	-8.8%	-9.6%
Legal and accounting (69)	24,375	26,376	22,910	25,385	22,748	23,755	-0.5%	-3.3%	4.4%
Management consultancy (70)	5,969	6,249	6,990	7,606	7,622	7,022	3.3%	-3.9%	-7.9%
Scientific R&D (72)	4,692	3,564	4,631	4,140	5,031	5,238	2.2%	12.5%	4.1%
Advertising and market research (73)	7,157	7,353	6,477	6,327	6,644	6,695	-1.3%	2.9%	0.8%
Other professional and technical services (74)	12,759	11,526	5,596	7,698	3,482	2,782	-26.3%	-39.9%	-20.1%
Veterinary services (75)	3,747	2,893	4,234	2,987	2,972	2,943	-4.7%	-0.8%	-1.0%
Employment activities (78)	7,971	8,304	7,439	5,635	7,891	9,506	3.6%	29.9%	20.5%
Office administration support (82)	15,554	12,221	11,992	10,875	11,340	9,968	-8.5%	-4.3%	-12.1%
Public administration (84)	107,915	107,368	104,837	104,021	99,296	99,750	-1.6%	-2.1%	0.5%
Medical	218,877	221,939	235,898	240,289	243,515	244,998	2.3%	1.0%	0.6%
Health (86)	141,014	142,347	148,087	156,227	157,063	154,837	1.9%	-0.4%	-1.4%
Residential care (87)	21,264	20,488	23,863	23,947	25,601	24,123	2.6%	0.4%	-5.8%
Social work (88)	56,599	59,104	63,947	60,115	60,851	66,037	3.1%	4.8%	8.5%
Personal	32,910	33,216	33,779	30,456	29,688	32,748	-0.1%	3.7%	10.3%
Household repair (95)	1,587	1,483	1,448	1,440	1,461	1,474	-1.5%	1.2%	0.9%
Other personal services (96)	31,323	31,733	32,331	29,016	28,227	31,275	0.0%	3.8%	10.8%
Sub-Total	515,451	513,987	523,507	514,894	507,467	515,009	0.0%	0.0%	1.5%
Category % of Total Employment	24%	24%	27%	27%	27%	28%	3.3%	1.2%	1.7%

Source: CSO QNHS and Forfás AES/ABSEI data; consultancy team review and analysis.

Note: NACE codes are shown in parentheses (QNHS data). From NACE 64 we have subtracted employment in internationally-traded financial services (Table A6) to avoid double-counting. The corresponding summary table in the main body of the report is Table 8.11 (p. 191).

Box A4: Profiles of, and Prospects for, Specific Sectors – Agri-Food

Strengths

- Key indigenous sector established over many years
- Central to Ireland's export-led recovery
- Unique grassland-based agricultural system
- Reasonable scale of farming in Meath
- Low carbon footprint (although greenhouse gas emissions – methane)
- Favourable climate to ensuring core products
- Provenance and reputation for quality, supported by significant investment over past decade to facilitate innovation – including from leading companies as well as from public funding
- Revealed comparative trade advantage for Ireland (OECD/WTO TiVA estimates) (New Zealand international leader)
- Well-designed enterprise supports
- Food Harvest
- Key product segments
 - Dairy products and ingredients
 - Meat and livestock
 - Tillage
 - Processed consumer foods and prepared meals
 - Other food and drinks products

Opportunities

- World population growth
- Rising incomes in emerging markets
- Ending of milk quotas in 2015
- Green island for produce – 'Origin Green'
- Enhanced CAP support for younger farmers
- Sustainable farming
- Organics – currently certified organic farming relatively low in Ireland
- Artisans and farmers' markets – but scale issue
- Functional foods and nutraceuticals to support growth in growing 'wellness' market
- Trade negotiations with other emerging economics (e.g. Africa Ireland Economic Forum)
- International moves towards food security and traceability will suit Ireland's reputation for quality
- Countervailing buyer power by grocery multiples – much PL production currently occurs outside of Ireland and Irish food companies could capture a bigger share of this market (but need to achieve scale)
- Attracting new talent (graduates) into sector
- Agronomy and consultancy services to more business/entrepreneurial sector

Issues/Barriers to Growth

- Access to credit/finance to support growth
- High utility costs affecting competitiveness (energy, waste)
- Ensuring scale among processor businesses
- Demographic concerns at primary level (age profile of farmers and young people entering farming)
- Countervailing buyer power by grocery multiples (but this is also an opportunity)
- Reliance on traditional markets (e.g. UK)
- Exchange rate movements euro/sterling
- Uncertainty re UK belonging to EU – possibility of trade barriers if UK decides to leave

Employment Prospects for Meath by 2022

- Positive in line with overall employment growth
- Focused on processing and manufacturing with less growth in primary owing to the nature of that stage of the sector
- Maintain existing share of employment

Source: Consultancy team review and analysis.

Box A5: Profiles of, and Prospects for, Specific Sectors – ICT

Strengths

- Growing sector in Ireland – even during the crisis
- Huge contribution to exports
- Most employment within the software services part of the sector, within which computer programming and consultancy, and information services, growing rapidly
- Ireland host to some of the world's leading manufacturers and software companies – clear 'demonstrator' effect for further FDI
- Ireland's success in FDI in ICT driven by strong international reputation for manufacturing excellence and technical capability
- Strong and growing research environment at universities
- Grass-roots development of the sector – 'Coderdojo' and Dublin Web Summit, helping to reinforce Ireland's reputation globally

Opportunities

- Convergence opportunities with other sectors given pervasiveness of ICT – eHealth, high-value manufacturing – ICT is not a sector by itself
- Also big opportunities in international financial services and business process operations
- BIG DATA and cloud computing – storage and analysis of large and complex datasets
- Information security (also an issue)
- Green IT
- Non-OECD emerging markets
- SaaS (software as a service)
- PaaS (platform as a service)
- E-procurement by public sector
- High-level of M&A activity, which is likely to escalate with international economic recovery
- Attracting people from abroad with skills

Issues/Barriers to Growth

- Big fall in % of all goods exported from Ireland – 13% 2012 (35.4% 2010) (Central Bank of Ireland data) (but signs of stabilisation/growth from 2011)
- Information security (also an opportunity)
- Skills in programming and higher-order activities – strong requirement for STEM skills (maths)
- Specific requirements include Java, C++, electronic engineering graduates, languages, market and business development skills
- Up-skilling also includes
 - Mainstream education and training
 - Conversion and re-skilling programmes
 - Continuing professional development (CPD) for existing workers
 - Attracting experienced international talent, including expatriate talent
- High-level of M&A (also an opportunity because it provides a strong incentive for new starts and successful groups, a fundamental feature of ICT)
- Risk of hardware/manufacturing seeking lower cost host countries in emerging markets
- Issue of low female penetration in the sector – women engineers (educational reform)

Employment Prospects for Meath by 2022

- Strong growth prospects in software/services component of ICT
- Challenge for Meath is to promote itself aggressively as a cost-competitive location with skills availability
- Target to maximise employment growth among those living and working within the county

Source: Consultancy team review and analysis.

Box A6: Profiles of, and Prospects for, Specific Sectors – Med-Tech

Strengths

- Strong multinational presence in Ireland
- Highly export-intensive – Ireland the second largest exporter in the EU after Germany
- Small number of indigenous companies achieving rapid exports growth (cumulative growth 82% during 2007-2012 compared with 37% for foreign firms, although from small base – Table 8.8, p. 187)
- Strong international reputation in process development and manufacturing
- Sustenance of jobs growth during recession
- Steady jobs growth
- Strong record of R&D supported by major public investment (SFI and PRTLII)
- Ireland's scientific research reputation in certain areas (biomedicine, genetics, nanotechnology and materials science) now among the best in the world (SFI)

Opportunities

- Strong global growth prospects
- Personalised health care set to grow even more rapidly ('patient-centric')
 - Diagnostics
 - Customised patient implants
 - Bio-engineering (prosthetics)
- Data capture and analysis – drive towards more information-oriented medicine and e-health
- Ireland to grow as a base for clinical trials to support innovation
- Closer engagement between healthcare system and industry to support the development of clinical trials – mutually-aligned incentives
- Possibility of hub for regulatory and IP management ('standards hub')
- Support indigenous enterprises in building their capabilities in certain areas, especially commercialisation and building relationships with global firms
- Also support firms in initiatives to enhance productivity (e.g. lean manufacturing and Six Sigma)

Issues/Barriers to Growth

- Downward pressure on pricing from healthcare payers – government and health insurers (but this will incentivise providers to enhance their efficiency)
- Highly competitive international marketplace
- Comparator countries pursuing similarly aggressive investment support strategies (e.g. Nordics, NI)
- Ireland's infrastructure for clinical R&D and innovation is considered to be fragmented, complex and uncompetitive – meaning that today Ireland is not being included in multinationals' clinical trials
- Lack of engagement between the healthcare system (government and HSE) and industry regarding clinical trials and innovation
- Skills gaps along the value chain – design, innovation, project management, commercialisation and marketing

Employment Prospects for Meath by 2022

- Prospects strong in Ireland but likely to be focused in main cities with established med-tech investment
- Driven by FDI and links with FDI firms
- Nevertheless, Meath has some demonstrator capability in med-tech (Alltech) and med-tech tends to be less geographically concentrated in Ireland compared with pharm-chem

Source: Consultancy team review and analysis.

Box A7: Profiles of, and Prospects for, Specific Sectors – Pharma-Chem

Strengths

- Sector in which Ireland has a well-established international comparative advantage
- 60% of all goods exports from Ireland are due to chemicals and pharmaceuticals, up from 42% in 2010
- OECD figures (TiVA, 2009) also illustrate revealed trading advantage, which is perhaps our strongest relative trading advantage of any activity
- Pharm-chem accounts for c. 20% of all exports of goods and services from Ireland (2012) (Table 8.8, p. 187)
- Renowned regulatory track record
- Strong support from State to R&D – PRTL and SFI
- Growing scientific research strengths – immunology, oncology, neuroscience and gastroenterology

Opportunities

- Personalised healthcare – “the appropriate treatment, in the appropriate way, to the appropriate patient, at the appropriate time”
- ‘Blockbuster’ to ‘niche-buster’ drugs targeted at patient sub-populations
- Bio-pharma – drugs based on large molecules
- US FDA (Food and Drug Administration) reports increase in new drugs approvals, which could lead to demand for more flexible, high-tech manufacturing in Ireland
- Demand for more ICT-based delivery of drugs to patients, not least given shift from hospital to home patient care
- Ireland therefore needs to be in a position to have capacity to meet this likely demand (niche-busters and ICT-related products)
- Closer engagement between healthcare system and industry to support the development of clinical trials – mutually-aligned incentives

Issues/Barriers to Growth

- Moderate growth prospects – experienced contraction during 2010-2012
- High costs – labour, waste, energy, local authority charges
- Ireland’s infrastructure for clinical R&D and innovation is considered to be fragmented, complex and uncompetitive – meaning that today Ireland is not being included in MNE’s clinical trials
- Patent cliff (but niche product opportunities)
- M&A likely to see rationalisation – current overcapacity in supply
- Significant cost and uncertainty in new product development
- Downward pressure on pricing from healthcare payers – government and health insurers (this will incentivise providers to enhance their efficiency)
- Competitor locations – as well as Singapore and Switzerland (manufacturing and increasingly R&D), also Costa Rica, China and India (who are looking to develop strengths in generics manufacturing)

Employment Prospects for Meath by 2022

- Prospects strong in Ireland but likely to be focused in main cities with established pharma-chem
- Driven by FDI and links between indigenous and FDI firms

Source: Consultancy team review and analysis.

Box A8: Profiles of, and Prospects for, Specific Sectors – <i>International Financial Services</i>	
<p>Strengths</p> <ul style="list-style-type: none"> • Very strong reputation in international financial services • Focus largely on investment administration, banking and capital markets, and non-life insurance • Much of it back-office administration requiring skills in banking, accounting, finance, actuarial, legal/regulatory etc. • These areas are complementary to those in other European centres (e.g. London is global leader in investment management) • Highly innovative products • Leading international companies established in Ireland • IFSC world-renowned 	<p>Opportunities</p> <ul style="list-style-type: none"> • Risk analysis, data security and information management (ICT-related) • Green financial products • Ageing population • Emerging markets – BRIC – and growing demand for financial, insurance and pension products, in turn increasing demand for back-office services to administer products • Private wealth management in emerging markets • Cross-border pensions
<p>Issues/Barriers to Growth</p> <ul style="list-style-type: none"> • Access to high-speed broadband among smaller, indigenous firms • Uncompetitive labour costs • Availability of key skills to facilitate further development – data analytics, regulatory compliance and risk management need to be maintained and augmented • Reputational effect of Irish banking crisis 	<p>Employment Prospects for Meath by 2022</p> <ul style="list-style-type: none"> • Owing to its favourable location, infrastructure and skills, plus existing FDI in this activity, Meath is well-placed to growth employment • Aim to maximise employment growth among those living and working in Meath
<p><i>Source: Consultancy team review and analysis.</i></p>	

Box A9: Profiles of, and Prospects for, Specific Sectors – *International Business Services*

Strengths

- Track record in shared services – finance, accounting and treasury management – by MNEs operating centralised functions in Ireland
- Emergence of indigenous shared services providers in recent years
- Dublin ranked 7th as a location for global services outsourcing in 2011 (the only city in the top 10 located in the western world and the only predominantly English-speaking city)
- Bases of comparative advantage
 - *Expertise* – ability to secure functional expertise in finance, IT, customer management and supply chain
 - *Operational excellence* – design processes and management of external relations
 - *Business partnerships* – working across business units
 - *Scale* – critical mass sustaining sector
- Favourable geography – between east and west – for international business needs

Opportunities

- Delivery of integrated business services – higher-order solutions to international businesses
- Centre of excellence in administration and management of share services operations for businesses
- Multi-lingual services to support the above
- Convergence with ICT – data analytics, cloud computing
- Convergence with med-tech and pharma-chem – possibility of intellectual property (IP) hub, regulatory standards hub

Issues/Barriers to Growth

- Costs – labour, rents – but have fallen during recession
- Cost competitiveness will facilitate further growth
- Inflexible commercial property leases
- Higher-order skills – risk analysis, legal/regulatory, business process engineering, language skills
- Availability of next generation networks (NGNs) key requirement

Employment Prospects for Meath by 2022

- Given its favourable location, infrastructure and skills, together with existing FDI firms, Meath is well-placed to growth employment
- Target maximising employment growth among those living and working in Meath

Source: Consultancy team review and analysis.

Box A10: Profiles of, and Prospects for, Specific Sectors – Engineering/Manufacturing/Mining	
Strengths <ul style="list-style-type: none"> • Range of different manufacturing industries • Relative large share in Meath compared with the country as a whole • Demonstrated employment growth of indigenous businesses in manufacturing/engineering/mining in Meath • Practical know-how and skills developed over many years 	Opportunities <ul style="list-style-type: none"> • Capability-building to facilitate growth of more modern manufacturing sectors in agri-food, ICT/hardware, med-tech and pharma-chem • In traditional as well as modern manufacturing sectors, key is to grow exports • Ensure educational and training provision for worker transition to more modern manufacturing and/or other sectors
Issues/Barriers to Growth <ul style="list-style-type: none"> • Declining traditional sectors • Risk and cost associated with R&D • Challenge of breaking into export markets • Maintaining competitiveness • Access to finance • Negative perceptions (as possible career option) 	Employment Prospects for Meath by 2022 <ul style="list-style-type: none"> • Given its comparably strong tradition in this area, Meath is well placed to sustain and growth jobs in manufacturing/engineering • Key to ensuring performance will be remaining competitive and exporting
Source: Consultancy team review and analysis.	

Box A11: Profiles of, and Prospects for, Specific Sectors – *Tourism and Hospitality*

Strengths

- Resilient sector in Ireland
- Long-standing source of service export earnings
- Growing sector today – overseas tourists up and employment growth 2.7% 2011-2012
- Particular product strengths of Irish tourism
 - Experiential tourism
 - Activity-based tourism
 - Business and conference tourism
 - Well-established markets – UK, Continental Europe, US and Canada

Opportunities

- Global market projected by 4% pa (2011-2021)
- BRIC demand likely to rise over the medium-term
- Island of Ireland dimension and joint promotion by Tourism Ireland
- Experience of competitiveness improvements and specific initiatives (VAT reduction and The Gathering) show how policy can help growth
- E-capability
- Diversification of product offerings – event tourism, sport tourism (golf), green tourism as well as traditional cultural/scenery tourism
- Building and repair of tourism infrastructure can create jobs in other parts of the economy (construction and retailing)
- Building on The Gathering with similar major initiatives in the coming years (e.g. 1916 commemoration) (but this needs to be planned in a sensitive way, with due regard for the unionist community on our island)

Issues/Barriers to Growth

- SMEs predominate with relatively limited resources
- Training for the tourism and hospitality sector tends to be relatively expensive (plant and equipment) and therefore expensive to attend
- Market failure – promotion, training and supporting events and festivals, and attractions (requires State intervention)
- Cost of visiting Ireland still high and perceived to be high by many people overseas
- Supply of accommodation throughout the country – varies from place to place – and indebtedness (NAMA) (especially significant for accommodation/hotels outside the main cities)
- Exchange rate uncertainty
- Visa issues – Ireland not part of Schengen Agreement, placing it at a disadvantage in respect of some markets
- Risk of negative impact of Ireland's crisis

Employment Prospects for Meath by 2022

- Strong prospects by virtue of its position next to Dublin and infrastructural links
- Signature status of Boyne Valley/Newgrange
- Short-stay/weekend breaks
- Overseas and domestic visitors
- Topical tourism (summer/autumn schools, educational/current affairs)
- Event tourism (demonstrator effect – e.g. Solheim Cup)

Source: Consultancy team review and analysis.

Box A12: Profiles of, and Prospects for, Specific Sectors – Retail and Wholesale	
Strengths <ul style="list-style-type: none"> • Large sector employing over 270,000 people nationally, most of which are in retailing (c. 187,000) • Generally competitive and flexible sector • Important source of employment for those with lower educational attainment • Nevertheless, experience in retailing cultivates skills in management, selling/marketing and entrepreneurial activity • As a result, retailing can lead to new businesses 	Opportunities <ul style="list-style-type: none"> • Growing in retailing and wholesaling opportunities in emerging markets with growing middle classes • Convergence opportunities with ICT to facilitate greater use of online shopping (e-tailing) • Another example of retailers' use or potential use of ICT concerns apps to incentivise local shopping and position them to be more responsive to local needs (e.g. special offers, availability, opening hours, events etc.) • Vertical integration of wholesaling and retailing • By relaxing the restrictions on store sizes and retail planning guidelines, the entry of global retailers to Ireland can be facilitated and this can help to boost productivity and efficiency (according to research conducted by McKinsey in 2009)
Issues/Barriers to Growth <ul style="list-style-type: none"> • Muted domestic demand • Property market collapse has adversely affected the sector • Access to finance a key constraint given the predominantly small scale of most retail businesses, many of which are family-owned • Retail cap on store sizes and retail planning guidelines restrict the size, location and working practices of retail outlets 	Employment Prospects for Meath by 2022 <ul style="list-style-type: none"> • Steady growth over the medium-term • But given challenges following the recession, there will also be turnover of businesses (entry and exit) • High-street and town centre retailers (and their chamber representatives) need to work closely with Meath County Council and strive to differentiate themselves compared with scaled retailers out-of-town (offering a different shopping/retail experience)
<i>Source: Consultancy team review and analysis.</i>	

Box A13: Profiles of, and Prospects for, Specific Sectors – Transport, Logistics and Distribution

Strengths

- Infrastructural sector serving the needs of other sectors and regional economic development
- Large and significant sector with c. 90,000 people in employment
- However has been in decline since 2007 (averaging 0.5% fall in employment per year)
- Demand for transport services is derived demand and dependent on the growth of other sectors
- Very large knock-on multiplier effect in terms of indirect and induced effects

Opportunities

- Build up critical mass of transport infrastructure in urban areas to support FDI and indigenous industry development
- Export-led sectors will increase demand for transport and support jobs in the sector
- Importance of ensuring competition at all stages of the transport value chain
- This includes seaports (Drogheda Port/Bremore)
- Protect and maintain existing assets
- Transport 21

Issues/Barriers to Growth

- Limited availability of State funding to support maintenance and improvement of the sector
- Perception of infrastructure deficit (IMD WYC 2014)
- Many business are funding-constrained as they are small and family-owned
- Vulnerable to rising fuel costs

Employment Prospects for Meath by 2022

- Dependent on economic demand – growth reflective of overall economic growth
- Possibility of development of port and logistics in-and-around Bremore site – deepwater facility an important differentiator asset for Meath and potential to attract FDI as well (but will require careful planning and partnership with port company)

Source: Consultancy team review and analysis.

Box A14: Profiles of, and Prospects for, Specific Sectors – Property and Construction

Strengths

- Large and diverse sector, which includes some high skills in specialist construction and construction professions as well as general building
- Strong multiplier effect across the economy
- Flexible in all sub-sectors
- Reputation of Irish civil and structural engineers internationally

Opportunities

- Green construction and SMART building
- Convergence opportunities with ICT
- Emerging market opportunities – buildings, power/energy, data centres etc.
- Oil and gas exploration in Ireland will create new opportunities for construction

Issues/Barriers to Growth

- Small scale of most businesses in construction
- Deferred capital spending due to fiscal constraints
- Private sector confidence and risk-taking
- Higher cost of building materials since the crash
- Re-skilling of construction workers

Employment Prospects for Meath by 2022

- Coming from a small base, there will inevitably be a small increase in employment but less compared with pre-crisis period
- Mistakes of the past must not be repeated

Source: Consultancy team review and analysis.

Box A15: Profiles of, and Prospects for, Specific Sectors – Green and Clean-Tech

Strengths

- Distinctive and plentiful supply of renewable energy resources, like wind and wave (but the former is also variable and the latter remains embryonic at this stage)
- Ireland 'green' image internationally
- Ireland's strong base of ICT companies that can facilitate development of SMART technologies along the green agenda
- Existing green economy research projects in Ireland provide a development for facilitating future commercial growth
 - I2E2 Energy Research Centre
 - Irish Maritime and Energy Resource Cluster (IMERC)
 - SmartBay Galway
 - Atlantic Marine Energy Test Site in Belmullet

Opportunities

- Like ICT, clean-tech is a pervasive activity and not necessarily a sector in its own right
- Developments driven by EU legislation (2020 Strategy and 20/20/20 climate/energy targets + new 2030 targets as well)
- Ireland's target is to achieve 16% of its overall energy from renewable sources by 2020, within which 40% of electricity supply from renewable sources
- Convergence between green and other sectors, including ICT, financial services (e.g. carbon trading), and tourism and hospitality
- Potential for Ireland to be an international test/standards hub for green-related technologies
- Other opportunities include
 - Water and waste water treatment technologies
 - Environmental consultancy services
 - Green/organic farming
 - Green transport
 - Energy storage technologies
- Green Public Procurement Action Plan
- Energy-from-waste and minimising land-filling
- PRIs (producer responsibility initiatives)

Issues/Barriers to Growth

- Young and embryonic sector
- Uncertainty regarding development of renewable energy sources in Ireland, reflecting planning issues and householder concerns
- Wind farms have low employment impact
- Offshore (marine) energy even more embryonic
- Commercialising Ireland's energy resources will require considerable investment and R&D, and market reform to incentivise investment
- Fragmentation and lack of coherence
- Public procurement tends not to favour SMEs with unproven technologies
- Ensuring adequate skills to realise opportunities
- Access to finance
- Public support for large technologies may be in short supply due to continued spending constraints

Employment Prospects for Meath by 2022

- Despite embryonic nature of the sector, there is growth potential (but this will require public support in various ways – informational and funding to facilitate firms' plans)

Source: Consultancy team review and analysis.

Box A16: Profiles of, and Prospects for, Specific Sectors – Arts, Entertainment and Recreation	
Strengths <ul style="list-style-type: none"> • Large and diverse sector employing almost 60,000 people currently • Facilitates the growth of other sectors, like tourism and retail • Arts and entertainment sub-sector growing rapidly (albeit from a low base of c. 13,000 employees) • Sector includes large voluntary base as well (sports and membership organisations) and this helps to build social capital, which yields economic benefits 	Opportunities <ul style="list-style-type: none"> • ICT support to tourism, arts/multi-media and entertainment (e.g. gaming) • Cultural and heritage tourism – ensuring a good supply of such infrastructure for visitors to enhance their experience of Ireland • Building on The Gathering 2013
Issues/Barriers to Growth <ul style="list-style-type: none"> • Gambling growing rapidly and currently employs about 6,500 people – could face regulatory curtailment • Small scale nature of the sector – many businesses are micro (< 10 employees) and many run on a part-time basis • Lack of professionalism in the sector – management and marketing skills • Access to finance • Heavy reliance of the sector on public funding 	Employment Prospects for Meath by 2022 <ul style="list-style-type: none"> • Scope for modest increase in employment in this sector, reflecting opportunities and growth in tourism
Source: Consultancy team review and analysis.	

Box A17: Profiles of, and Prospects for, Specific Sectors – Education (Public and Private)

Strengths

- Large sector employing in the region of 140,000 people currently
- Ireland has a strong tradition in certain segments like teaching English as a foreign language (TEFL/EFL)
- Reputation of our education system – although could be stronger as outlined in the Structural Pillar
- Strong base of ICT
- Reputation as a small, friendly and generally benign country – important for middle-class families sending their children abroad for education
- Campus-style of our universities, which tends to be viewed positively in respect of European/international students

Opportunities

- International education is growing rapidly – International Education Strategy (2010-2015)
- Significant demand from BRIC countries – particularly at third-level
- CPD market for existing professionals
- Convergence opportunities with ICT – e-Learning, educational materials and resources
- Convergence with other sectors like tourism
- Expanding TEFL/EFL

Issues/Barriers to Growth

- Large reliance on public sector employment
- Fiscal constraints may mean constrained growth potential
- Strong international competition from UK and US, and from comparator countries like Denmark, in the provision of third-level education
- Perceived performance of Irish universities – may not have the same cache as those in other countries
- British Council a huge factor for Britain's success in attracting international students
- Visa issues - Ireland's non-membership of Schengen places it at a relative disadvantage in terms of ease of international access which may hinder the realisation of the full potential for internationalisation in this sector
- Crisis in the provision of private third-level education in Ireland aimed at overseas/international students (June 2014) is likely to do serious damage to the activity in Ireland, with the potential to affect other parts of the overall sector, including TEFL/EFL and international student recruitment by HEIs (universities and IoTs).

Employment Prospects for Meath by 2022

- While Meath has limited third-level educational capacity, there is some opportunity for adult education and CPD courses (but limited because they are likely to be absorbed by third-level institutions skirting the county)
- Limited employment growth for public sector education due to fiscal constraints

Source: Consultancy team review and analysis.

Box A18: Profiles of, and Prospects for, Specific Sectors – Domestically/Locally-Traded Services

Strengths

- Large sector employing over 500,000 people or c. 28% of the workforce nationally
- Professional and business services – c. 250,000
- Medical and related services – c. 250,000
- Personal services a further 35,000
- Backbone of professional life in Ireland
- Absorbs a significant proportion of graduates – but this may also be seen as a weakness
- Predominantly stable and reliable sector from an employment perspective

Opportunities

- Reform of the professions – in line with Troika requirements
- Lower costs of using the professions
- Opportunities may be created for other sectors – ICT, education and training (e.g. CPD, HEIs)

Issues/Barriers to Growth

- Restrictions on competition – seen by the Troika as disproportionate and requiring amendment
- Slow progress made to date – the Competition Authority's recommendations can to light over a decade ago
- High costs of accessing practitioners (law and medicine)
- Perceived lack of innovation (due to restrictions on competition)
- High barriers to entering professions lead to high rents and perception that the uncompetitive nature of certain professions (law and medicine) diverts talent away from more productive sectors with higher employment potential

Employment Prospects for Meath by 2022

- Employment growth in line with overall employment growth in most sub-sectors, with likely higher employment growth in personal services (although this tends to be a high turnover activity with relatively high entry and exit of businesses)

Source: Consultancy team review and analysis.

Table A10: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Central Scenario

Working & Living in Meath		Persons Employed				CAGR
		2011	%	2022	%	
Total		28,449	100.0%	34,384	100.0%	1.7%
1	Agricultural, forestry & fishing	2,670	9.4%	3,227	9.4%	1.7%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	13.2%	4,546	13.2%	1.7%
3	Construction	1,165	4.1%	1,444	4.2%	2.0%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	29.4%	10,099	29.4%	1.7%
5	Information and communication, financial, real estate, professional, administration and support service activities	3,262	11.5%	4,494	13.1%	3.0%
6	Public administration and defence; compulsory social security	1,540	5.4%	1,861	5.4%	1.7%
7	Education, human Health and social work activities	5,798	20.4%	7,008	20.4%	1.7%
8	Other service activities	1,411	5.0%	1,705	5.0%	1.7%
9	Not stated	486	1.7%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The sum of the results in this table and the next table overleaf (Table A11) determine the results for the total number of people working in Meath (Table 8.17 on p. 227 of the main body of the report).

Table A11: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Central Scenario

Working in Meath and Living Elsewhere - Inbound Commuters	Persons Employed				CAGR
	2011	%	2022	%	
Total	10,373	100.0%	12,537	100.0%	1.7%
1 Agricultural, forestry & fishing	192	1.9%	232	1.9%	1.7%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	1,753	16.9%	2,119	16.9%	1.7%
3 Construction	554	5.3%	670	5.3%	1.7%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	2,824	27.2%	3,413	27.2%	1.7%
5 Information and communication, financial, real estate, professional, administration and support service activities	1,421	13.7%	1,818	14.5%	2.3%
6 Public administration and defence; compulsory social security	855	8.2%	1,033	8.2%	1.7%
7 Education, human Health and social work activities	2,351	22.7%	2,841	22.7%	1.7%
8 Other service activities	340	3.3%	411	3.3%	1.7%
9 Not stated	83	0.8%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The sum of the results in this table and the previous table above (Table A10) determine the projections for the total number of people working in Meath (Table 8.17 on p. 227 of the main body of the report).

Table A12: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Central Scenario

Living in Meath and Working Elsewhere - Outbound Commuters		Persons Employed				CAGR
		2011	%	2022	%	
Total		32,942	100.0%	39,815	100.0%	1.7%
1	Agricultural, forestry & fishing	225	0.7%	272	0.7%	1.7%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	4,186	12.7%	5,059	12.7%	1.7%
3	Construction	992	3.0%	1,199	3.0%	1.7%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,891	27.0%	10,746	27.0%	1.7%
5	Information and communication, financial, real estate, professional, administration and support service activities	7,771	23.6%	9,577	24.1%	1.9%
6	Public administration and defence; compulsory social security	2,972	9.0%	3,592	9.0%	1.7%
7	Education, human Health and social work activities	6,636	20.1%	8,020	20.1%	1.7%
8	Other service activities	1,116	3.4%	1,349	3.4%	1.7%
9	Not stated	153	0.5%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).
Note: The sum of the results in this table and the previous two tables (Table A10 and Table A11) determine the projections for the wider employment relating to Meath (Table 8.18 on p. 228 of the main body of the report).

Table A13: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Optimistic Scenario

Working & Living in Meath	Persons Employed				CAGR
	2011	%	2022	%	
Total	28,449	100.0%	35,306	100.0%	2.0%
1 Agricultural, forestry & fishing	2,670	9.4%	3,314	9.4%	2.0%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	13.2%	4,668	13.2%	2.0%
3 Construction	1,165	4.1%	1,483	4.2%	2.2%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	29.4%	10,370	29.4%	2.0%
5 Information and communication, financial, real estate, professional, administration and support service activities	3,262	11.5%	4,614	13.1%	3.2%
6 Public administration and defence; compulsory social security	1,540	5.4%	1,911	5.4%	2.0%
7 Education, human Health and social work activities	5,798	20.4%	7,195	20.4%	2.0%
8 Other service activities	1,411	5.0%	1,751	5.0%	2.0%
9 Not stated	486	1.7%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The sum of the results in this table and the next table overleaf (Table A14) determine the results for the total number of people working in Meath (Table 8.19 on p. 229 of the main body of the report).

Table A14: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Optimistic Scenario

Working in Meath and Living Elsewhere - Inbound Commuters		Persons Employed				CAGR
		2011	%	2022	%	
Total		10,373	100.0%	12,873	100.0%	2.0%
1	Agricultural, forestry & fishing	192	1.9%	238	1.9%	2.0%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	1,753	16.9%	2,176	16.9%	2.0%
3	Construction	554	5.3%	688	5.3%	2.0%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	2,824	27.2%	3,505	27.2%	2.0%
5	Information and communication, financial, real estate, professional, administration and support service activities	1,421	13.7%	1,866	14.5%	2.5%
6	Public administration and defence; compulsory social security	855	8.2%	1,061	8.2%	2.0%
7	Education, human Health and social work activities	2,351	22.7%	2,918	22.7%	2.0%
8	Other service activities	340	3.3%	422	3.3%	2.0%
9	Not stated	83	0.8%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The sum of the results in this table and the previous table above (Table A13) determine the projections for the total number of people working in Meath (Table 8.19 on p. 229 of the main body of the report).

Table A15: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Optimistic Scenario

Living in Meath and Working Elsewhere - Outbound Commuters		Persons Employed				CAGR
		2011	%	2022	%	
Total		32,942	100.0%	40,882	100.0%	2.0%
1	Agricultural, forestry & fishing	225	0.7%	279	0.7%	2.0%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	4,186	12.7%	5,195	12.7%	2.0%
3	Construction	992	3.0%	1,231	3.0%	2.0%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,891	27.0%	11,034	27.0%	2.0%
5	Information and communication, financial, real estate, professional, administration and support service activities	7,771	23.6%	9,834	24.1%	2.2%
6	Public administration and defence; compulsory social security	2,972	9.0%	3,688	9.0%	2.0%
7	Education, human Health and social work activities	6,636	20.1%	8,235	20.1%	2.0%
8	Other service activities	1,116	3.4%	1,385	3.4%	2.0%
9	Not stated	153	0.5%	0	0.0%	-100.0%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).
Note: The sum of the results in this table and the previous two tables (Table A13 and Table A14) determine the projections for the wider employment relating to Meath (Table 8.20 on p. 230 of the main body of the report).

Table A16: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working and Living in Meath in the Pessimistic Scenario

Working & Living in Meath	Persons Employed				CAGR
	2011	%	2022	%	
Total	28,449	100.0%	29,546	100.0%	0.3%
1 Agricultural, forestry & fishing	2,670	9.4%	2,773	9.4%	0.3%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	3,761	13.2%	3,906	13.2%	0.3%
3 Construction	1,165	4.1%	1,210	4.1%	0.3%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,356	29.4%	8,678	29.4%	0.3%
5 Information and communication, financial, real estate, professional, administration and support service activities	3,262	11.5%	3,388	11.5%	0.3%
6 Public administration and defence; compulsory social security	1,540	5.4%	1,599	5.4%	0.3%
7 Education, human Health and social work activities	5,798	20.4%	6,022	20.4%	0.3%
8 Other service activities	1,411	5.0%	1,465	5.0%	0.3%
9 Not stated	486	1.7%	505	1.7%	0.3%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).

Note: The sum of the results in this table and the next table overleaf (Table A17) determine the results for the total number of people working in Meath (Table 8.21 on p. 231 of the main body of the report).

Table A17: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Working in Meath and Living Elsewhere (Inbound Commuters) in the Pessimistic Scenario

Working in Meath and Living Elsewhere - Inbound Commuters		Persons Employed				CAGR
		2011	%	2022	%	
Total		10,373	100.0%	10,773	100.0%	0.3%
1	Agricultural, forestry & fishing	192	1.9%	199	1.9%	0.3%
2	Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	1,753	16.9%	1,821	16.9%	0.3%
3	Construction	554	5.3%	575	5.3%	0.3%
4	Wholesale, retail trade, transportation and storage, accommodation and food service activities	2,824	27.2%	2,933	27.2%	0.3%
5	Information and communication, financial, real estate, professional, administration and support service activities	1,421	13.7%	1,476	13.7%	0.3%
6	Public administration and defence; compulsory social security	855	8.2%	888	8.2%	0.3%
7	Education, human Health and social work activities	2,351	22.7%	2,442	22.7%	0.3%
8	Other service activities	340	3.3%	353	3.3%	0.3%
9	Not stated	83	0.8%	86	0.8%	0.3%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).
Note: The sum of the results in this table and the previous table above (Table A16) determine the projections for the total number of people working in Meath (Table 8.21 on p. 231 of the main body of the report).

Table A18: Projections of Persons Employed in County Meath by Sector in 2022 – Persons Living in Meath and Working Elsewhere (Outbound Commuters) in the Pessimistic Scenario

Living in Meath and Working Elsewhere - Outbound Commuters	Persons Employed				CAGR
	2011	%	2022	%	
Total	32,942	100.0%	34,213	100.0%	0.3%
1 Agricultural, forestry & fishing	225	0.7%	234	0.7%	0.3%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	4,186	12.7%	4,347	12.7%	0.3%
3 Construction	992	3.0%	1,030	3.0%	0.3%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	8,891	27.0%	9,234	27.0%	0.3%
5 Information and communication, financial, real estate, professional, administration and support service activities	7,771	23.6%	8,071	23.6%	0.3%
6 Public administration and defence; compulsory social security	2,972	9.0%	3,087	9.0%	0.3%
7 Education, human Health and social work activities	6,636	20.1%	6,892	20.1%	0.3%
8 Other service activities	1,116	3.4%	1,159	3.4%	0.3%
9 Not stated	153	0.5%	159	0.5%	0.3%

Source: Consultancy team review and analysis of the baseline employment situation (summarised in Table 8.4, p. 175), national projections (summarised in Table 8.6, p. 179), sectoral and sub-sectoral opportunities and prospects (summarised in Table 8.12-Table 8.14, pp. 193-195) and spatial assessment (summarised in Table 8.15, p. 217).
Note: The sum of the results in this table and the previous two tables (Table A16 and Table A17) determine the projections for the wider employment relating to Meath (Table 8.22 on p. 232 of the main body of the report).