



Planning Department  
 Meath County Council  
 Buvinda House  
 Navan  
 Co. Meath

6<sup>th</sup> March 2020

**RE: Meath County Council Draft Development Plan 2020-2026  
 Submission on behalf of  
 Fitzwilliam Real Estate Capital, Co. Meath**

Dear Sir/Madam

In response to the publication of the Draft County Development Plan 2020 – 2026 on 18<sup>th</sup> December last, and your invitation to members of the public and other interested parties to make observations and submissions with respect to the draft plan, please note that Brady Hughes Consulting has been appointed by Fitzwilliam Real Estate Capital to make the following submission on their behalf.

**Executive Summary**

Fitzwilliam Real Estate Capital has an interest in approx. 45 Ha in Laytown adjacent to the train station comprising –

- 2 Ha zoned TU in Draft Plan – for "Park and Ride" facilities.
- 15 Ha zoned E2 in the Draft Plan designated as a 'Strategic Employment Site'.
- 28 Ha un-zoned.

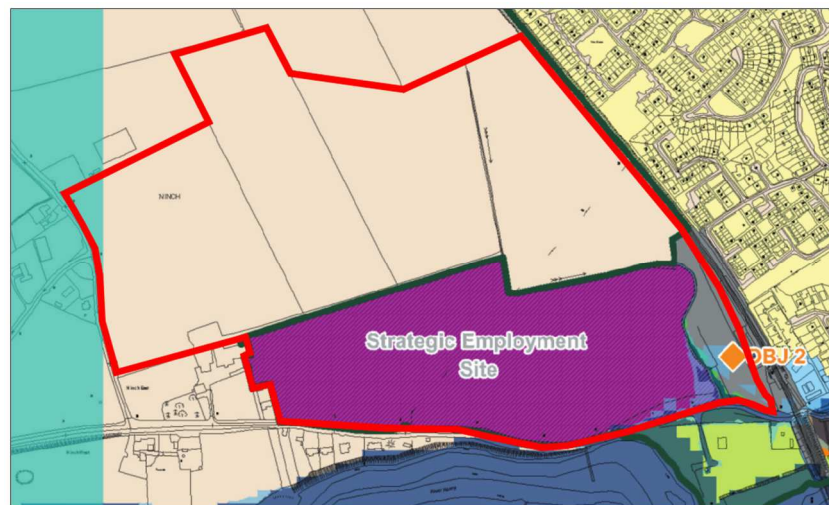


Figure 1 – Excerpt from Draft Land Use Zoning Map identifying lands controlled by Fitzwilliam Real Estate Capital

To deliver high quality, people-intensive employment uses as envisaged by the draft CDP, we feel that E2 is too restrictive in some ways (no retail, community or residential) and too open in other ways (small scale manufacturing, abattoir, waste management etc. all open for consideration). We seek to achieve a change from E2 to C1 to enable us to secure the investment and commitment required.

We seek the establishment of a strategic land reserve on the balance of our client's property to protect these lands from inappropriate uses and to provide clarity and guidance to potential employers that the lands have a long term committed future from a planning policy point of view. A strategic reserve or 'White Lands' designation will allow our client to actively seek large scale strategic developments such as a Data Centres on the subject lands.

We would also respectfully suggest that the development boundary should take in East Meath Utd soccer club site, and that it should be zoned appropriately to protect its status. Our client is happy for MCC to designate some of the subject lands with appropriate zoning to facilitate the expansion of the club and its facilities and to provide a "landing space" for other active recreational and community uses for LBMD which require immediate accommodation.

We would further suggest that all of this area west of the railway line be provided with a Master Plan objective to ensure that it is developed appropriately. A Masterplan should be required to be prepared for these lands and agreed with the planning authority before any planning applications are submitted.

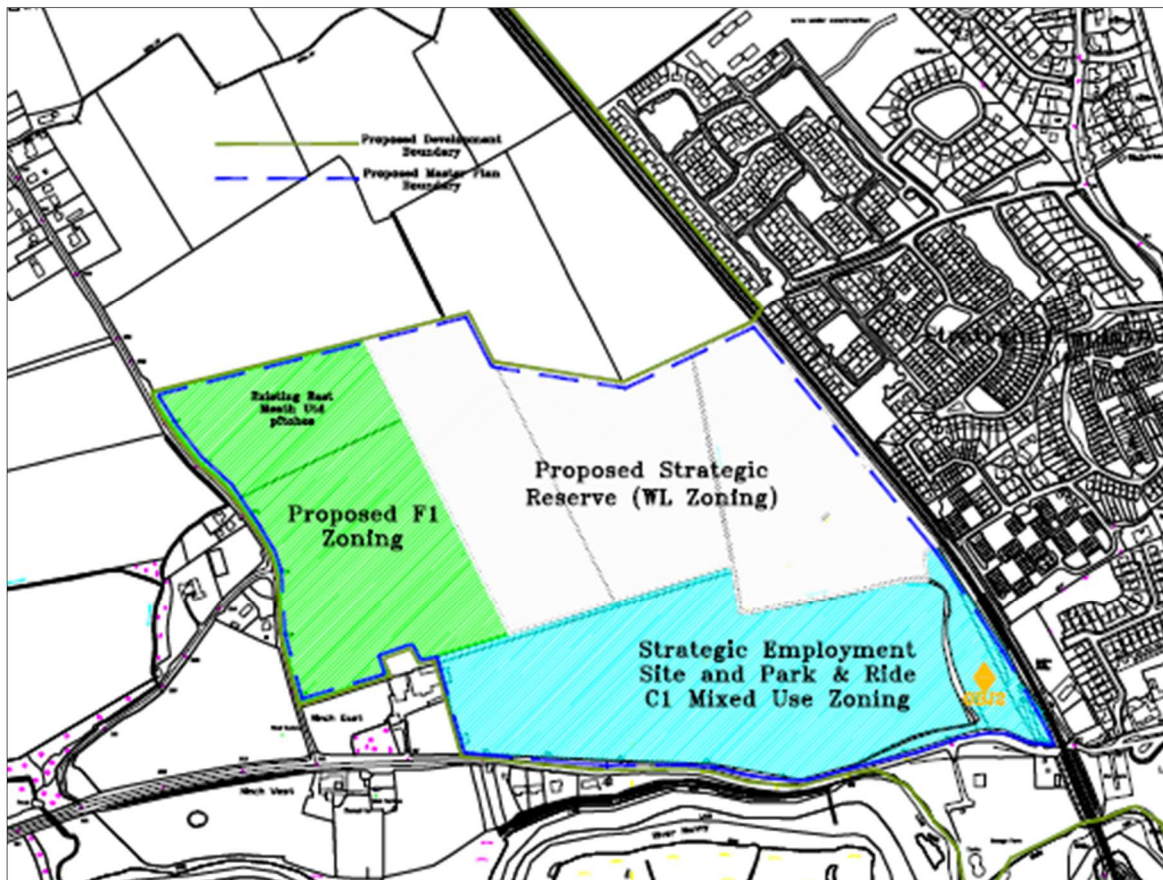


Figure 2 – Suggested Land Use Zoning for Strategic Employment Zone and adjoining lands

Should the requested changes be made to the land use zoning map and written statement, our clients envisage a first phase of development on the subject lands, adjacent to the train station in Laytown, that would include the following elements within the life of the County Development Plan 2020 - 2026:

- Park and Ride Car Park
- Enterprise Centre – “Mill 2” (working title) – 1800 sq.m. total over 2 floors.
- “Step-up” own door employment use space – similar in size, arranged with fewer individual units, and bigger individual floor plates.
- Community/mixed-use with residential over. The ground floor could include convenience retail, community space, office spaces (<100sq.m professional services), Café, Creche, Medical etc. type uses with perhaps 50 apartments/duplex units overhead.
- Large scale office building, 6,000 sq.m can be delivered in phases and be extendable.
- Housing – 100 units.

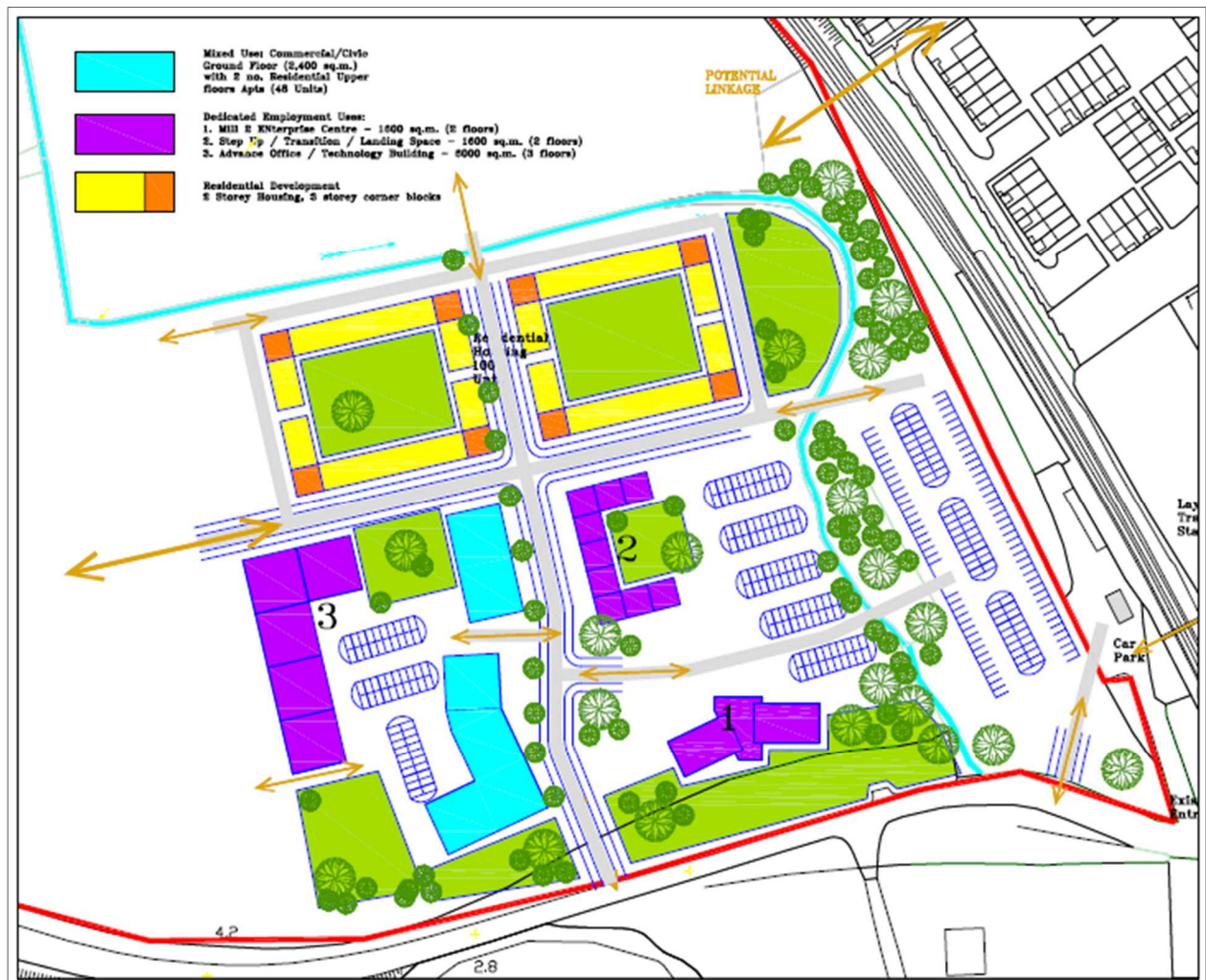


Figure 3 – Indicative Masterplan for Phase 1

In short, a full range of uses as Phase 1 of a live-work community on this Strategic Employment Site. In relation to the strategic investment opportunities – we envisage the provision of hot-desking, space for start-ups, landing space for smaller FDI companies, space to expand at every

level, and an advance office building to reach out to existing Dublin based FDI companies for secondary location opportunities. Fitzwilliam is in a position to leverage its market position to secure a tenant for this advance building once planning permission is in place. We propose a range of residential unit types and community facilities to serve new employees that wish to move to the area.

The residential element is an integral part of the offering in terms of attracting employers. Accommodation for staff forms a critical part of the decision-making process. The attraction for an employer moving here from Dublin is the shorter commute for staff, excellent public transport links, affordable range of housing/accommodation options including better quality of life for staff and their families.

The overall package that our client can leverage will include the availability of further space to the west. With optimum land use and development policies in place, statutory bodies like Enterprise Ireland, the I.D.A., and Meath County Council can work with our client and its service providers to market this unique opportunity. Furthermore, the lands to the north for which we seek strategic land reserve status will potentially be available for strategic opportunities should they arrive during the lifetime of the plan. Their designation as “WL” is required to give a clear indication of future intent to potential investors for the long term.

The suggested Masterplanning objective, requiring the agreement of a masterplan with the planning authority prior to individual planning applications being submitted will ensure that the early phases of development deliver the employment uses ‘up front’, and that any residential development accompanies job creation.

The attached report prepared by **Dr Pat McCloughan of PMCA Economic Consulting** sets out an Economic Rationale for the proposed changes sought to the Draft CDP in this instance. As set out with relevant evidence, the rationale for the proposed project (and the proposed zoning changes to enable the project to become a reality) is multifaceted and includes the following requirements for the settlement of Laytown-Bettystown-Mornington-Donacorney (LBMD):

- “More high quality employment in LBMD to enhance its overall employment performance.”
- “Combat the extremely high outbound commuting rate from the settlement.”
- “Address the costs associated with outbound commuting, including climate change.”
- “Build on the strong skills in LBMD.”
- “Take advantage of the strong IT skills and broadband availability in LBMD.”
- “More appropriate uses with C1 Mixed Use than E2 General Enterprise and Employment.”
- “Enhanced delivery under C1 Mixed Use than E2 General Enterprise and Employment.”
- “Need for more housing supply.”
- “Reduce both inbound and outbound commuting rates for more successful settlements.”

The PMCA report also provides an economic impact assessment of the proposed phase 1 mixed use, live work community development as set out above. Dr McCloughan’s key findings may be summarised as follow:

- An additional 556 persons at work in LBMD directly attributable to the proposed development.
- A reduction in the outbound commuter rate from 83% to 75%
- Increase the jobs to population rate from 7% to 11%, a significant move in the right direction.

## Background:

Fitzwilliam Real Estate Capital, led by its MD Noel Smyth, is active across several significant Commercial, Retail, Hospitality and Residential developments in Dublin. Fitzwilliam invests on their own behalf and in joint ventures with various funds, families and general investors.

Fitzwilliam has advised and invested in a succession of successful companies, PLC's, CMBS schemes and has been at the forefront of raising finance and restructuring in a significantly changed development and finance landscape post the deep recession.

Through Fitzwilliam's activity in the City Centre and Sandyford Industrial Estate, it became clear that many international companies have developed, or wish to develop, dual operations, offering multiple workplace options that leverage the benefits of both urban and suburban locations.

A key driver for international companies as they assess secondary site options is the need to secure transit-oriented locations in the suburbs where their staff either live or can find reasonably affordable accommodation and better work/life balance opportunities. Office developments located proximate to key multimodal high-frequency public transport hubs can take advantage of reverse commuting opportunities too.

Accordingly, Fitzwilliam Real Estate Capital has recently acquired an interest in a 45 ha (approx.) site adjacent to Laytown train station. See figure 4 below, which identifies the landholding.

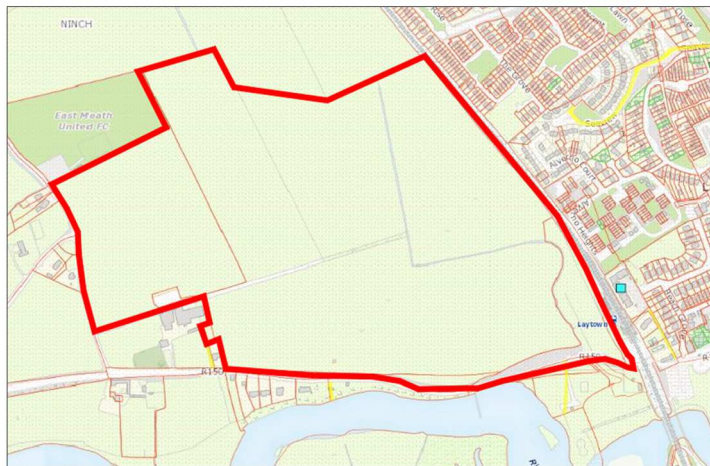


Figure 4 – Fitzwilliam Controlled Lands

We believe that the public transport node, coupled with the availability of a highly educated workforce locally, provides a compelling opportunity for the creation of a live-work

community that can deliver on the Draft Development Plan policies and objections for the region.

Fitzwilliam Real Estate Capital is uniquely placed to leverage its wide network to deliver employment-focused office and mixed-use development at Laytown. Fitzwilliam's vision for the Laytown lands provides an opportunity to extend their successful office development strategy, helping to provide the quality of accommodation modern business requires.

Please note that Noel Smyth's family companies originally set up Dunloe Ewart PLC which was an amalgam of two PLC companies, one in Northern Ireland and one in the South in the late 90's. The company went on to assume ownership of Cherrywood Industrial and Retail Park in South County Dublin and the company was the lead developer amongst 17 other developers in ensuring that the extension of the Luas line from Sandyford to Cherrywood was implemented.

In addition to other developments, the company was responsible for, through its involvement in Ewart plc in Belfast for the development of the Hilton Hotel in Belfast, PWC Offices and Allstate Insurance, amongst others.

In 2013 Fitzwilliam took over Arnotts Department Store and since then has developed a 40,000 sq.ft. retail unit on Henry Street for Next. Fitzwilliam is currently building a 315 room hotel for Motel One, a large German entity and plans to be on site in Q3 of 2020 for a further 257 key hotel on Middle Abbey Street over the Arnotts Car Park.

The company has also various sites in key areas which it intends to develop mixed use live work communities over the next five years and in this regard, Fitzwilliam has identified an opportunity to deliver a significant quantum of office space at Laytown Train Station within a mixed-use campus providing a work environment which will prioritise health, well-being and community. This location provides scope to embrace a live-work-play mentality and employment development here is the beginning of the end of the crippling commute that impacts so many in Laytown and the neighbouring communities of Bettystown, Mornington and Donacarney.

This site can leverage its direct access to Laytown Train Station to ensure that this location is not only an employment hub for residents of the immediate area but will also become a key employment option for sustainable "backwards commuting" along the train line with workers travelling by train from Drogheda and Connolly Station and all stops in-between.

## **Key Issue**

Our client has recognised the potential of the subject site to deliver a strategic employment opportunity beside the existing train station at Laytown. The Draft CDP has also recognised this opportunity and has designated part of the subject lands as a 'Strategic Employment Zone' and provided E2 (General Enterprise and Employment) Zoning.

<p><b>E2 General Enterprise and Employment</b></p> <p><b>Objective:</b> 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.</p>	<p>E2 lands constitute an important land bank for employment use which must be protected. The development of E2 lands seek 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.</p>	<p>Bring Banks, Builder's Providers, Childcare Facility, Car Park (incl. Park and Ride), CHP / Waste to Energy Facilities, Domestic Fuel Depot, Energy Installation, Enterprise &amp; Business Start Ups, Enterprise / Training Centre, Factory Shop, Furniture Showroom (only where product displayed is manufactured on site), Go Kart Track, Industry – General, Industry – Light, Heavy Vehicle Park, Logistics, Mart / Co-op, Motor Repair / Servicing, Plant &amp; Tool Hire, Recycling Facility (Civic &amp; Amenity), Science &amp; Technology Based Enterprise, Telecommunication Structures, Transport Depot, Warehousing, Utilities.</p>	<p>Abattoir, Car Dismantler / Scrap Yard, Construction &amp; Demolition Waste Recycling Facility, Garden Centre, Leisure Facilities, Motor Sales, Offices 100 – 1,000m<sup>2</sup>, Service Station, Restaurant / Café, Veterinary Surgery, Waste Recycling / Transfer / Sorting Centre, Wholesale Warehousing / Cash and Carry.</p> <p>Uses which are 'open for consideration' or not identified as 'permitted' under the E2 zoning objective will only be considered where they do not compromise the objective of the overall zoning objective of E2 lands, for general enterprise and employment uses.</p>
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Figure 5 – E2 Zoning as per Draft CDP

The objective of E2 zoning is to provide for employment through 'industrial, manufacturing, distribution, warehousing and other general employment'. We would respectfully suggest that given the profile of the population living and commuting from LBMD, and the deficiencies in the road network locally (including at Julianstown) that traditional industries envisaged for E2 zoning are not appropriate here. Manufacturing, Industrial, Logistics etc are not suited to this environmentally sensitive location and the priority should be on attracting clean businesses, as described in Section 4.2 of the written statement for East Meath which states:

*There are opportunities to provide co-working facilities in the area that would function as an outreach for city-based employers. Such employment would be vital to improving the jobs ratio and creating a more sustainable settlement and reversing the substantial rates of outbound commuting experienced in this area. To this end, a strategic employment site has been identified on the lands adjacent to the rail station in Laytown.*

Chapter 4 of the Draft CDP, Economy and Employment Strategy at Section 4.7.4.1 sets out a vision whereby a 'people intensive enterprise opportunity' could help redress current commuter levels in the area. A number of Economic Development objectives are included in Chapter 4 including:

*ED OBJ 51 – To Promote East Meath as an employment base and encourage start up businesses in the area.*

*ED OBJ 52 (and BLMD OBJ 4) – To support the development of industrial, manufacturing, distribution, warehousing, technology and campus style office-based employment on the strategic employment lands west of Laytown Rail Station. Enterprise and employment proposals shall be developed in tandem with park and ride facilities and enhanced pedestrian connectivity between the rail station and the residential development further north in Laytown all to facilitate the development of a sustainable 'live work' community.*

*BLMD OBJ 5 – To identify a suitable location and support the Provision of a co-working facility in East Meath that functions as an outreach hub for city-based employers.*

Our client's vision for their landholding at Laytown accords with the Draft CDP in many ways:

- The existing train station creates a unique opportunity.
- Jobs/workers ratio creates a unique opportunity.
- Workers in large office-based employment sites in Dublin City Centre want to stop unsustainable commuting.
- Employers in Dublin are finding it increasingly hard to locate affordable quality office space.
- There is an opportunity to provide a significant advance office facility of scale on the subject site to take advantage of the factors outlined above.
- There is an opportunity to provide co-working and start-up incubation facilities at the subject site.
- There is an opportunity to move LBMD towards a live-work community through increased employment opportunities associated with this site.
- There is a very real opportunity to develop Laytown into a vibrant live-work community and to develop an actual live work community on the strategic employment site.

However, the E2 zoning is **not**, we respectfully suggest, the best way of achieving that outcome. E2 is better suited to industrial estates, for heavier perhaps dirtier industry. A significant FDI employer is not going to relocate or co-locate to the subject site if there is a risk that the neighbouring site will be developed for potentially noisy and dirty industrial development such as those permitted and open for consideration on E2 lands. Such uses include waste to energy facilities, heavy vehicle parks, logistics parks, scrap yards, abattoirs, and waste transfer stations.

We contend that C1 Zoning, with the adjoining lands identified as a strategic reserve, is more conducive to achieving this objective. This is particularly so when the site also happens to be located contiguous to a rapid transit rail network, an established settlement and an incredible amenity on its doorstep. A Master Plan objective for the Strategic Employment Site will allow the promoters prepare and agree a masterplan with the Planning Authority. This can then be used to market to and inform potential tenants and/or investors in the area of the long-term vision for the lands and their potential.

C1 Zoning has been designated on a significant site at Bettystown Town Centre in recognition that the B1 zoning currently in place on that site is too narrow and prescriptive to attract the necessary investment. We would ask that this logic is applied to the Strategic Employment Site in Laytown which already has a Train Station in place.

C1 Zoning provides for the following:

<p><b>C1 Mixed Use</b></p> <p><b>Objective:</b> To provide for and facilitate mixed residential and employment generating uses</p>	<p>Lands identified for mixed use development are only appropriate in higher tier settlements. The objective on these lands is to provide opportunities for high density mixed use employment generating activities that also accommodate appropriate levels of residential development thereby facilitating the creation of functional 'live work' communities. These areas are generally located in proximity to high frequency public transport corridors.</p> <p>In order to achieve balanced development the percentage of residential development in C1 zones shall generally not exceed 50 % of the quantum of development.</p>
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Figure 6 – C1 Objective and Guidance from Ch 11 of the Draft CDP

The guidance given in relation to C1 zoning is that it will provide opportunities for high-density mixed-use employment generating activities, generally located in close proximity to high-frequency public transport. I would contend that the subject site, being adjacent to the Dublin Belfast Rail line, soon to be provided with even higher frequency DART services is better located in this regard than the lands in Bettystown. We note there is an objective to have a new Train Station provided in Bettystown (along with Navan, Dunshaughlin and other places) and this is of course to be supported, but it is incumbent on all of the stakeholders in this process to make the best use of sustainable infrastructure already in place.

C1 zoning allows for office-based development of every size, Science and Technology, third level education, residential development, and all of the uses outlined as being included in our Phase 1 mixed-use development, which is the subject of PMCA Economic Consulting's attached report.

In short, the key issue is that it will not be possible for Fitzwilliam Real Estate Capital (or, respectfully, any other promoter for that matter) to deliver on the opportunities that both they and the Draft CDP have identified for the site with E2 Zoning. It is only within the economic model of a master-planned and future proofed mixed-use development that one can deliver employment of sufficient scale to materially impact the local and regional economy and redress the lack of investment, jobs and high commuter rates in the county. As such, a change from E2 to C1 zoning is sought.

## Planning History and Context

### Meath County Development Plan 2013 – 2019

The consolidated version of the 2013 CDP published online does not include a land-use zoning map for East Meath (Bettystown, Laytown, Mornington, Donaycarney).

### East Meath Local Area Plan 2014 – 2020

Part of the Land is currently zoned for E2 employment Uses in the current plan. This has resulted in no development and no jobs created. Respectfully, increasing the amount of E2 land and designating it a ‘Strategic Employment Site’ will not change this position.

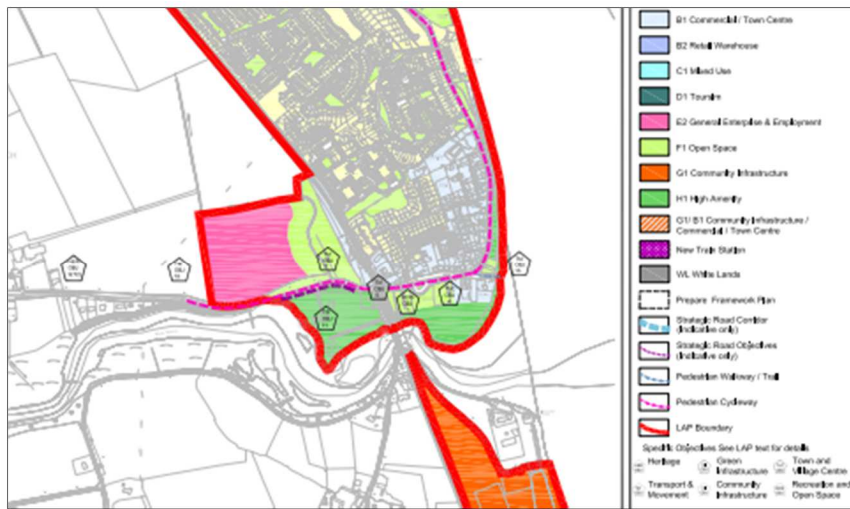


Fig 7 – Part of the 2014 LAP Zoning Map

Prior to this, the lands were zoned for residential use (A4) since at least 2004 and that zoning extended to all of the lands currently controlled by Fitzwilliam REC. We understand that in or about 2005, planning permission was granted to a combination of Piers Construction and Liberty Homes for construction of 1600 residential units on foot of that zoning designation.



Fig 8 – Local Press announcement regarding planned development



Fig 9 - BKD Architects Layout of the proposed 'eco-village' for which permission was granted circa 2005.

The site has an established history of zoning and permitted residential development. Figure 10 below is an extract from the Residential Evaluation Maps attached to the 2014 East Meath LAP. This exercise resulted in the de-zoning of most of the subject site. It is interesting to note that the other large A2 (yellow coloured) site shown in the map lost its residential status too at that time. It was not de-zoned however: the land was retained within the settlement development boundary as a Strategic Land Reserve with White Lands Zoning. It is this classification that we wish to have restored to our client's lands which remain un-zoned in the Draft CDP).

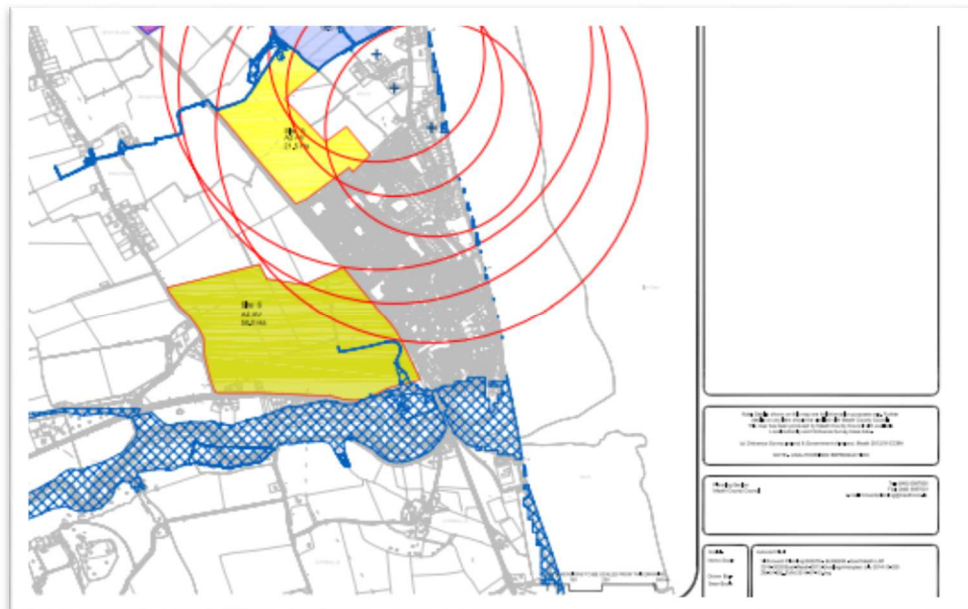


Fig 10 – From 2014 Land Evaluation exercise

## National and Regional Planning Context

### National Planning Framework, Ireland 2040

- The NPF notes the population of Laytown/Bettystown/Mornington/Donaycarney (hereinafter referred to as LBMD) as being 11,872 with 4,712 resident workers and 772 jobs. The Jobs / Workers ratio is 0.164.
- 81 settlements in the EMRA area are listed, the average worker/jobs ratio is 0.86 and only two settlements perform poorer than LBMD i.e. Lusk and Sallins.
- The NPF envisages an additional half million people living in the Eastern Region and an additional 320,000 working between now and 2040.

The NPF includes the following National Policy Objectives which are very relevant to the subject site and our proposal to provide a live work community thereon:

#### National Policy Objective 3c

Deliver at least 30% of all new homes that are targeted in settlements other than the five Cities and their suburbs, within their existing built-up footprints<sup>19</sup>.

Approximately 275,000 new homes will be required in the Eastern Region and a minimum of 82,500 of them will be located in settlements other than the identified cities.

#### National Policy Objective 4

Ensure the creation of attractive, liveable, well designed, high quality urban places that are home to diverse and integrated communities that enjoy a high quality of life and well-being.

We respectfully suggest that our vision for the subject site aligns perfectly with NPO 4.

#### National Policy Objective 5

Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.

Dublin, Balbriggan, LBMD, Drogheda, Dunleer, Dundalk, Newry, Portadown, Belfast all form part of the Regional City conurbation, with sufficient scale to compete internationally. This is best viewed in the context of the map provided in Section 2.2 of the NPF, below.



#### National Policy Objective 10b

Regional and Local Authorities to identify and quantify locations for strategic employment development, where suitable, in urban and rural areas generally.

#### National Policy Objective 11

In meeting urban development requirements, there will be a presumption in favour of development that can encourage more people and generate more jobs and activity within existing cities, towns and villages, subject to development meeting appropriate planning standards and achieving targeted growth.

Objectives 10b and 11 above are complimentary and again accord with our vision for Laytown. A strategic employment development, coupled with residential, amenity and community facility elements can encourage more people, jobs and activity within the existing town of Laytown.

#### National Policy Objective 27

Ensure the integration of safe and convenient alternatives to the car into the design of our communities, by prioritising walking and cycling accessibility to both existing and proposed developments, and integrating physical activity facilities for all ages.

Our proposed development will not be car dependent, with work, school and leisure facilities all within walking distance for existing and new residents. The location at a multimodal transport hub with frequent services locally, and north and south to Dublin and Belfast mean cars ownership will be a matter of choice for new residents.

We note the ambition targets set out in NPO 32, and our vision is that any new homes that accompany the strategic employment development will be at a location that can sustainably support the development.

#### National Policy Objective 32

To target the delivery of 550,000 additional households to 2040

#### National Policy Objective 33

Prioritise the provision of new homes at locations that can support sustainable development and at an appropriate scale of provision relative to location.

We feel that the proposed employment hub will take commuters off the road network and reduce their carbon footprint accordingly in accordance with the objectives of NPO 54 (below). Reverse commuting results in more sustainable use of existing capacity in the public transport network (both road and rail).

#### National Planning Objective 54

Reduce our carbon footprint by integrating climate action into the planning system in support of national targets for climate policy mitigation and adaptation objectives, as well as targets for greenhouse gas emissions reductions.

#### National Policy Objective 72a

Planning authorities will be required to apply a standardised, tiered approach to differentiate between i) zoned land that is serviced and ii) zoned land that is serviceable within the life of the plan.

Objective 72a is followed up in appendix 3 of the NPF which sets out the criteria for zoning lands. Tier 1 lands are described as follows:

#### Tier 1: Serviced Zoned Land

This zoning comprises lands that are able to connect to existing development services, i.e. road and footpath access including public lighting, foul sewer drainage, surface water drainage and water supply, for which there is service capacity available, and can therefore accommodate new development.

These lands will generally be positioned within the existing built-up footprint of a settlement or contiguous to existing developed lands. The location and geographical extent of such lands shall be determined by the planning authority at a settlement scale as an integral part of the plan-making process and shall include assessment of available development services.

Inclusion in Tier 1 will generally require the lands to be within the footprint of or spatially sequential within the identified settlement.

The entirety of the subject site meets the requirements for Tier 1 lands. Its juxtaposition beside the railway station, and its ability to deliver on many of the Draft CDP objectives further add strength to the case for increased zoning and flexibility

#### East Midlands Regional Authority's RSES (Regional Spatial and Economic Strategy)

The finalised Regional Spatial and Economic Strategy for the EMRA region was developed following adoption of the National Planning Framework Ireland 2040. The RSES further defines regional policy objectives, including the following which are relevant to our submission:

- RPO 3.3: *Local authorities shall, in their core strategies, identify regeneration areas within existing urban settlements and set out specific objectives relating to the delivery of development on urban infill and brownfield regeneration sites in line with the Guiding Principles set out in the RSES and to provide for increased densities as set out in the 'Sustainable Residential Development in Urban Areas', 'Sustainable Urban*

*Housing; Design Standards for new Apartment’s Guidelines’ and the ‘Urban Development and Building Heights Guidelines for Planning Authorities’.*

- *RPO 4.13: Promote and enhance cross-border interactions to realise the growth potential of Drogheda-Dundalk-Newry as an important cross-border network for regional development*
- *RPO 9.10: In planning for the creation of healthy and attractive places, there is a need to provide alternatives to the car and to prioritise and promote cycling and walking in the design of streets and public spaces. Local authorities shall have regard to the Guiding Principles for ‘Healthy Placemaking’ and ‘Integration of Land Use and Transport’ as set out in the RSES and to national policy as set out in ‘Sustainable Residential Development in Urban Areas’ and the ‘Design Manual for Urban Roads and Streets (DMURS)’.*

### **Draft County Development Plan Policies**

The Settlement and Housing Strategy Vision of the Draft CDP is *To facilitate the sustainable growth of the towns and villages throughout the County by promoting consolidation and compact development in an attractive setting that provides a suitable mix of housing and supporting amenities and ensuring co-ordinated investment in infrastructure that will support economic competitiveness and create a high-quality living and working environment.*

Our requested revisions which will allow for the mixed-use development considered by PMCA Economic Consulting in their attached Economic Impact Assessment report, fully accords with this expressed vision.

The settlement hierarchy designates LBMD as a self-sustaining town, one step above the lowest level settlements listed in the hierarchy. This is despite the fact that this census town is the second largest in Co. Meath.

<p><b>Self-Sustaining Towns</b></p>	<p>Towns with high levels of population growth and a weak employment base which are reliant on other areas for employment and/or services and which require targeted ‘catch up’ investment to become more self sustaining.</p>	<p>Laytown/Bettystown/Mornington/ Donacarne Ratoath Enfield Duleek Stamullen Kilcock</p>
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Figure 11 – Excerpt from Settlement Hierarchy

The Core Strategy sets a population growth target for LBMD of 1500 over the lifetime of the County Plan. The table below shows the projected growth figures for each of these same Tier Settlements. LBMD, with existing high frequency multimodal public transport services already in place, has the lowest planned growth for any such settlement in the county. This lack of ambition for the settlement is a barrier to attracting the scale of employers needed to reverse outbound commuting trends.

<b>Self-Sustaining Towns</b>			
	<b>2016 Pop.</b>	<b>Planned Growth</b>	<b>% increase</b>
LBMD	11872	1500	12.63%
Ratoath	9533	1500	15.73%
Enfield	3239	1000	30.87%
Stamullen	3361	500	14.88%
Kilcock	93	500	537.63%
Totals	28098	5000	17.79%

Figure 12 – Planned growth in Self Sustaining Towns as per Draft CDP figures

We welcome and agree with the main tenants of Section 4.7 of the Draft CDP, which set out the economic and employment section of the plan and designates part of the site as a Strategic Employment Site. This feeds into specific objectives relating to the subject lands, or part thereof:

*ED OBJ 52 (and BLMD OBJ 4) – To support the development of industrial, manufacturing, distribution, warehousing, technology and campus style office-based employment on the strategic employment lands west of Laytown Rail Station. Enterprise and employment proposals shall be developed in tandem with park and ride facilities and enhanced pedestrian connectivity between the rail station and the residential development further north in Laytown all to facilitate the development of a sustainable ‘live work’ community.*

*BLMD OBJ 5 – To identify a suitable location and support the Provision of a co-working facility in East Meath that functions as an outreach hub for city-based employers.*

As outlined previously, we don't agree with the description of the type of employment uses outlined in ED OBJ 52, logistics, warehousing etc. along with light industry and general industrial uses will not generate the quantum of full-time equivalent jobs required to reverse outbound commuting.

Broadly, the Draft CDP is positive about the subject lands and the opportunity that exists for the establishment of employment uses on the site. Unfortunately, the execution of that vision as expressed in the land use zoning map falls short when it comes to delivery. E2 zoning with no scope for future expansion will not deliver on the potential provided by an existing mass transit high-frequency rail service serving a catchment which is limited by the Irish Sea to the East, River Nanny to the South, poor road network to the North and planning policy preventing development to the West of the rail line. This seems like a real missed opportunity to make the most of infrastructure that all of the settlements including Meath's Key Towns and Growth Towns aspire to achieve. Only the Regional Growth Centre of Drogheda can rival Laytown's Transport Links in the county, and its designated status in National and Regional policy stems from its position on the Dublin Belfast Economic Corridor and the availability of multimodal transport opportunities. Laytown's role, potential, and location in this regard is not referenced in the Draft CDP.

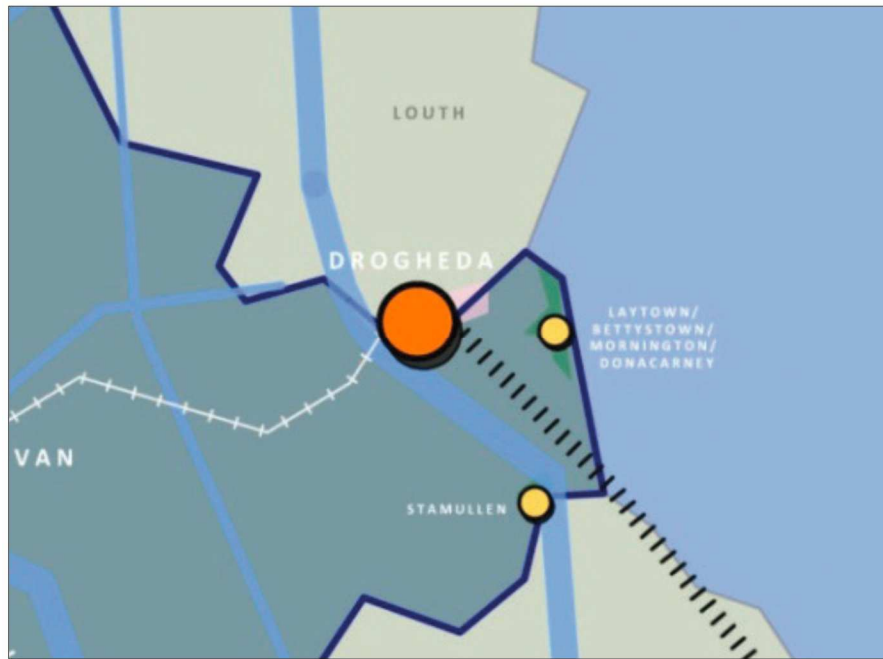
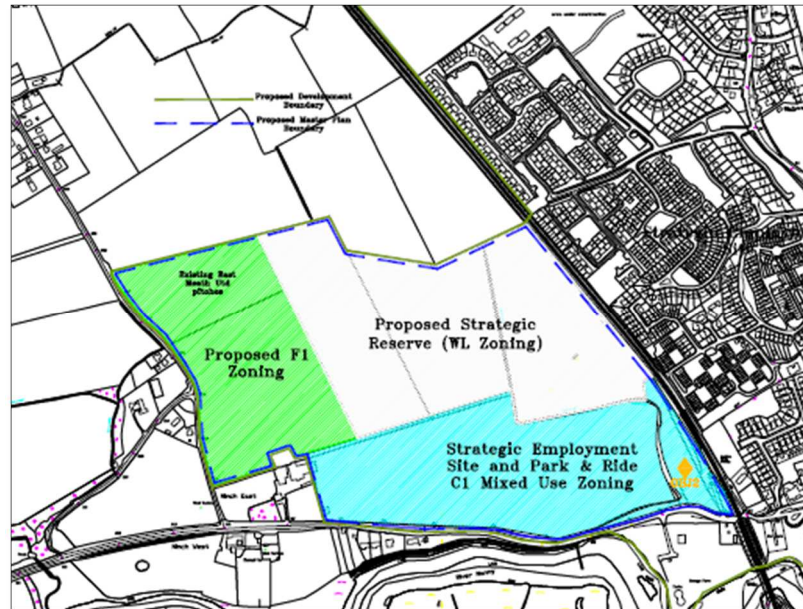


Fig 13 – Excerpt from CDP Map 2.3 Core Strategy Map

The Draft CDP Core Strategy Map seems to suggest that Laytown enjoys the same rail access as Stamullen – i.e. none. The Core Strategy Map shows settlements like Navan and Dunshaughlin linked to rail lines that are ‘future’ connections but fails to highlight a settlement that already has rail links. This important policy document is the first point of access and enquiry for potential investors in the area, and this needs to be addressed if the planning authority desire to deliver employment on the designated Strategic Employment Site at this train station. All Strategic Sites should be identified on the Core Strategy Map.

## Requested Changes

1. That the Development Boundary Should be extended and zoning in this area amended to reflect the proposal set out in Fig 2 (reproduced below)



2. That all of the zoned land west of the Dublin Belfast Rail line be provided with a Masterplanning Objective.
3. Bettystown, Laytown, Mornington, Donaycarney should be moved up the Settlement Hierarchy and it should be designated a Self-Sustaining Growth Town.
4. Reword ED OBJ 52 (and BLMD OBJ 4) to reflect the zoning changes proposed, i.e. the focus should be on delivering a masterplan led mixed-use development which brings employment opportunities with residential opportunities in tandem. The master planning exercise, to be agreed with the planning authority should emphasize up-front delivery of employment opportunities.
5. Include Specific Local Objectives to ensure that the Masterplan addresses the following matters:
  - 5.1 That pedestrian and bicycle connectivity between the subject site and Laytown is enhanced within Phase 1 of the Masterplan.
  - 5.2 That the MCC Depot south of the subject site which is zoned High Amenity be accommodated within Phase 1 of the Master Plan lands.
  - 5.3 That a Park & Ride Facility be delivered within Phase 1 of the Masterplan

## Impact of requested Changes.

The requested changes, if made would see Fitzwilliam Real Estate Capital move to agree a masterplan with MCC immediately on adoption of the County Development Plan. Planning applications for ‘The Mill 2’ would follow (subject to MCC agreement) and the Phase 1 vision as outlined earlier in this submission would begin to be realised.

The impact economically to the area and region is detailed in the attached PMCA report, but in summary, the following is a summary of the key impacts:

- 556 new full-time equivalent (FTE) jobs on the Strategic Development Site by the end of 2026 as a direct result of the proposed project, which will only be capable of being delivered if the E2 zoning in respect of the Strategic Development Site in the Draft CDP 2020-2026 is amended to C1 Mixed Use zoning, which is more appropriate to the lands and would incentivise the developer to deliver the much-needed new employment.
- Coupled with general economic growth likely to obtain in LBMD between now and 2026, the PMCA report estimates that there would be 1,449 persons at work in the settlement of LBMD in 2026 (as compared with 893 in the absence of the proposed project and thus in the case where the zoning would be E2) (by comparison there were 772 persons at work in LBMD in 2016 and 804 in 2011).
- The proposed project would impact positively on the outbound commuter rate from LBMD in 2026, where the PMCA report estimates the outbound commuter rate for the settlement of 75% in that year; whereas without the project the outbound commuter rate would be 83% in 2026. In the accompanying PMCA report, Dr. Pat McCloughan is mindful of how the outbound commuter rate is calculated: it is given as the number of persons living in the settlement and working outside of *County Meath* divided by the sum of the number of outbound commuters and the number of persons living in Meath and working in the settlement. Measured in this way the outbound commuter caters for Meath County Council’s objective of maximising the number of people both living and working within County Meath.
- Thus, the project (which will be dependent on the proposed zoning changes set out in this letter/report) will have a considerably positive impact on reducing the outbound commuter *rate* from LBMD.
- The jobs-to-population ratio with the employment-generating project will be 11% in 2026, which while still low is nonetheless appreciably higher than the 7% ratio observed in 2016 and signals that the settlement is moving in the right direction towards greater work-live sustainability.
- As observed at the end of the PMCA report (p. 20) *“The Proposed Development therefore has the capacity to be a ‘game-changer’ in enabling much-needed new high quality employment for LBMD.”*

Note finally that the economic/employment impacts estimated in the PMCA report are the likely estimates of new jobs in LBMD due directly to the proposed project, and in turn to the proposed zoning changes. The estimated direct new jobs due to the project do not include the knock-on jobs that would be created or sustained elsewhere in the economy as a result of the direct employment from the project (but the direct employment is the most important element and hence are the focus of the PMCA study – the secondary, knock-on jobs in other sectors of the economy can be estimated as part of the planning application for the project in due course by applying economic impact multipliers to the direct new jobs).

## Summary

Our client has identified the subject lands as being ideally located for the provision of high-volume office-based employment opportunities. The location adjacent to the railway station, the reverse commute opportunity, the high level of outbound highly qualified commuters, and the strategic location regionally make it a unique proposition, within the ‘Goldilocks Zone’ which is “just right’ for:

- Access to Dublin City Centre, Access to Dublin Airport, Access to a large educated work force;
- Cost of delivery of workspaces;
- Residential opportunities for expanding employers;
- Quality of life with access to a stunning natural amenity.

Fitzwilliam has a track record of delivery in this regard.. Their vision can deliver over 550 f.t.e. jobs within the lifetime of the County Development Plan.

However this potential cannot be realised without a mix of uses and as such the benefits predicted in the PMCA report will not accrue.

I trust that this is to your satisfaction and that you will take the forgoing into consideration when completing the Development Plan for 2019 – 2025

Yours Faithfully



Brian Hughes  
BA BAI CEng MIEI  
Chartered Engineer

### Attachments:

1. Letter of Support from Breannán Casey, General Manager at The Mill, Drogheda
2. Economic Impact Report prepared by PCMA Economic Consulting.



Submission prepared by:

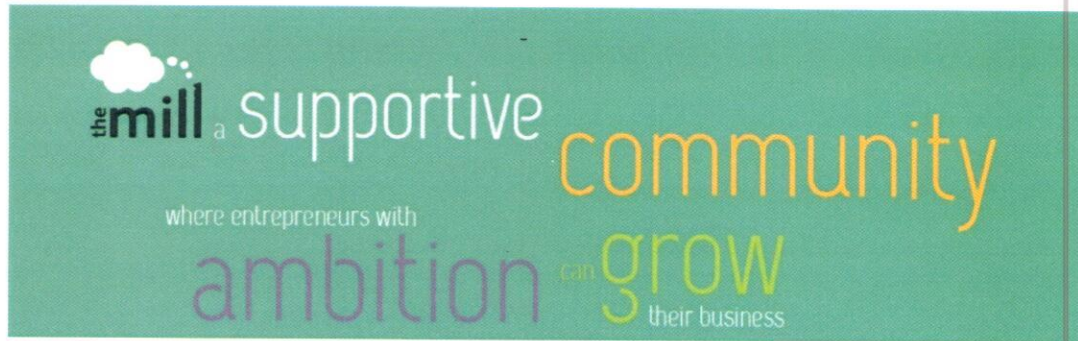
Brian Hughes, Brady Hughes Consulting, 26 Magdalene Street, Drogheda, Co. Louth  
on behalf of

Fitzwilliam Real Estate Capital

Phone: (01) 661 5525

Email: [dw@fitzwilliamrec.com](mailto:dw@fitzwilliamrec.com)

Address: Leopardstown Office Park, 2nd Floor, Elm House, Burton Hall Ave, Sandyford,  
Dublin 18



Drogheda Enterprise Centre CLG  
t/a The Mill Enterprise Hub  
Newtown Link Road  
Drogheda  
Co Louth

March 5<sup>th</sup> 2020

Mr Noel Smyth  
Fitzwilliam Real Estate Capital Limited  
Leopardstown Office Park  
2nd Floor Elm House,  
Burton Hall Ave  
Sandyford  
Dublin 18

***Subject to Contract / Contract Denied***

**Re: Proposed Enterprise Hub at Laytown, County Meath.**

Dear Mr Smyth,

I am writing further to our ongoing discussions and your team's visits to the Mill Enterprise Hub, Drogheda, County Louth.

As you are aware, The Mill Hub opened in 2014 and has quickly expanded: now eighty people are working here within 35 individual companies ranging from startups to emergent FDIs. We doubled our size to 15,000 sq ft in 2017.

The Mill has proven to be a huge success story for Drogheda signalling the latent capability and enterprise potential of the region.

It has become an instrumental tool for delivering jobs to Drogheda, and the community is now aware that it is not an automatic requirement to develop and scale businesses in Dublin, but instead, this can happen in the regions.

The Mill has proven to be a place which is greater than the sum of its parts, providing exposure and

networking opportunities to its occupants: many tenants will say that they have secured new clients and new commissions and business simply by being located here.

The Mill has successfully funded and completed two building phases of the Enterprise Hub since 2014 at an overall cost of circa €2million. This has included successful partnership with local government (Louth County Council/LEO), State enterprise agencies (Enterprise Ireland), internal funding, and financial support from indigenous and FDI firms.

In February 2017, representatives from The Mill Enterprise Hub spoke at an Innovation Hub Briefing at Leinster House. The briefing to members of the Dail and Seanad was organised to highlight the importance of Innovation Hubs in creating a sustainable regional economy. The Mill was invited as one of the top four 'best-practice' enterprise hubs in Ireland.

We have worked closely with the Drogheda Young Innovators programme to promote entrepreneurship amongst second level students, as well as hosted a summer Innovation Day for teenagers with Foroige. We actively support and lead several regional projects such as the M1 Corridor marketing campaign, the M1 Payments Corridor, and M1 Drogheda Chamber Skillnets. The [www.M1PaymentsCorridor.com](http://www.M1PaymentsCorridor.com) aim is to establish a fintech cluster which would cover the M1 Payments Corridor, running from Belfast to Dublin including Meath.

As discussed, The Mill Hub is a registered charity and it is our expectation from our discussions that, subject to Fitzwilliam securing a suitable outcome from the County Development Plan Review that terms will be reached in relation to the potential for an Enterprise Hub site donation and funding that would make it viable to open a Hub to ensure that locals have an attractive location to work or to start a business. East Meath commuters, according to Census 2016 had the highest % of commuters travelling for over 90 minutes – this Hub will help to alleviate that issue and provide locals with a better work / life balance. It is important that The Enterprise Hub be developed as part of the early phase of overall plan, and we believe that it can greatly contribute the economic well-being of East Meath.

In this context, we forward this letter of support for your zoning submission which you are welcome to fix to your submission and hope to work closely with Fitzwilliam once the County Development Plan is adopted in December to deliver an Enterprise Hub adjacent to Laytown Train Station.

Yours sincerely,



Brendán Casey

[bcasey@themilldrogheda.ie](mailto:bcasey@themilldrogheda.ie)

Innovation & Enterprise Manager

The Mill Enterprise Hub

041-980244

087-6292144

# Economic Rationale for, and Impacts of, a Proposed Mixed Use Development Project on Lands at Laytown, Co. Meath

21 February 2020

## 1. Introduction and Overview

This report is prepared by Dr. Pat McCloughan, Managing Director of PMCA Economic Consulting. It provides an evidence-based study of the employment potential of certain lands at Laytown, Co. Meath (the 'Subject Lands'), which include the Strategic Employment Site identified for Laytown-Bettystown-Mornington-Donacorney ('LBMD') in the Draft Meath County Development Plan 2020-2026 ('Draft CDP').

The report is provided on behalf of Fitzwilliam Real Estate Capital Limited ('Fitzwilliam'), who have a portfolio of completed projects in the commercial, retail, hotel and residential sectors in Ireland, the UK and abroad, and who have control of the Subject Lands. The report estimates the *likely direct employment* that could be delivered on part of the Strategic Employment Site by 2026 as follows:

- 92 persons working on a full-time equivalent (FTE) basis at a new enterprise hub, which would be based on The Mill Enterprise Hub ('The Mill') in Drogheda, which the developer has considered and visited, and whose employment impact PMCA believes can be replicated in LBMD.
- The same number of FTEs (92) in a step-up enterprise centre, which would have the same gross area as the enterprise hub (1,600m<sup>2</sup>/17,222ft<sup>2</sup>) but with larger floor-plates to accommodate firms graduating from the enterprise/incubation hub and/or other enterprises seeking workspaces in the East Meath area.
- An advance office building (6,000m<sup>2</sup>/64,583ft<sup>2</sup>) capable of accommodating 344 FTEs, including foreign-direct investment (FDI) firms bi-locating from Dublin as well as indigenous enterprises.
- Further workspaces for other employment uses complementing the preceding buildings and residential units envisaged for the lands. This building would comprise 2,400m<sup>2</sup>/25,833ft<sup>2</sup> for retail, café/eatery, crèche and other services/utilities, and capable of accommodating 28 FTEs.
- Together the four employment buildings (11,600m<sup>2</sup>/124,861ft<sup>2</sup>) could generate a likely 556 FTEs by 2026 (from a potential 834 FTEs), which would represent a considerable contribution towards the objective of facilitating more employment in this rapidly growing settlement in East Meath, in which there were just 772 persons at work in 2016, whereas the population was 11,872 in that year, implying an extremely low and unsustainable jobs-to-population ratio of only 7%.

To facilitate the proposed employment development on the Strategic Employment Site, amendments in regard to the Subject Lands in the Meath CDP 2020-2026 are sought, including:

1. That the zoning of the Strategic Employment Site be amended from E2 General Enterprise and Employment to C1 Mixed Use, a more appropriate land use zoning objective for the settlement.
2. That the whole Subject Lands are included in the Development Boundary of the New CDP.
3. That a parcel of land between the Subject Lands and Laytown Train Station (under the control of Fitzwilliam) is zoned C1 Mixed Use to enable delivery of a park-and-ride facility by 2026.
4. That the balance of the Subject Lands be zoned WL White Lands to protect them from inappropriate uses contrary to the vision of realising a new live-and-work community in LBMD.

With these amendments, Fitzwilliam will have an incentive to develop the Subject Lands with the jobs dividend as outlined here. Given the scale and strategic location of the Subject Lands, it is recommended that the Subject Lands be subject to a Master Plan during the Meath CDP 2020-2026 ('MP2 Laytown').

## 2. Map of the Subject Lands at Laytown, Proposed Zonings and Master Plan

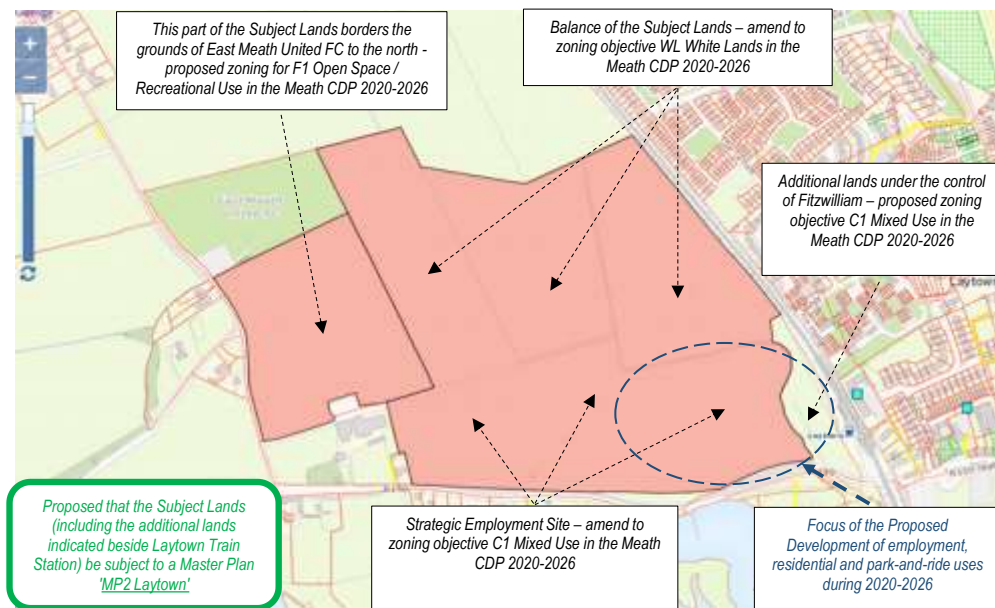
A map showing the Subject Lands (in pink) is given in Figure 1. The Strategic Employment Site within the Subject Lands occurs to the south. The part of the Strategic Employment Site plus the additional lands between the Strategic Employment Site and Laytown Rail Station (not coloured in pink but also under the control of Fitzwilliam) ringed in blue illustrates (approximately) the extent of the Proposed Development during 2020-2026, in which the four new employment buildings, the park-and-ride facility and residential units will be installed by 2026, subject to the lands in question being zoned C1 Mixed Use, which Dr. McCloughan considers a more appropriate zoning objective for the lands given the goal of enabling more employment to occur within Meath permeating the Draft CDP, which is welcome.

In regard to that part of the Subject Lands immediately south of the grounds of East Meath United Football Club (shown in green), it is proposed to zone the particular lands in question for F1 Open Space use in the Meath CDP 2020-2026, which would allow for growth of sports/recreational facilities next to East Meath United FC that could be used by other organisations in the area (athletics, basketball etc.).

In respect of the balance of the Subject Lands indicated on the map, this should be zoned as WL White Lands in the Meath CDP 2020-2026, in order to protect the lands from inappropriate development and to ensure connectivity between the Subject Lands and Laytown to the east (for example, a walkway and/or cycleway from Laytown to the proposed open space/recreational site to the west (including the grounds of East Meath United) would enable users to walk, jog or cycle to and from the settlement and the new sports/recreational facilities on that part of the Subject Lands).

The Subject Lands have significant social as well as economic potential for the benefit of existing and new residents of LBMD in the coming years. It is thus recommended that the Subject Lands be subject to a Master Plan in the Meath CDP 2020-2026, to ensure their appropriate and orderly development.

**Figure 1: The Subject Lands showing Proposed Land Use Zoning Objectives for the County Meath CDP 2020-2026**



Source: Fitzwilliam, Brady Hughes Consulting and PMCA Economic Consulting.

Note: Detail of the additional lands under Fitzwilliam's control indicated in this map (beside Laytown Rail Station) is given in Figure A1 (p. 21).

### 3. Economic Rationale for the Proposed Zoning Changes

#### 3.1. Introduction

As well as incentivising the developer to deliver the Proposed Development comprising the new employment buildings on the Subject Lands, the rationale for the proposed zoning changes is based on the following requirements (in no particular order of importance), which are outlined in turn:

- High quality employment in LBMD to enhance the overall composition of employment.
- Combat the extremely high outbound commuting rate from the settlement.
- Address the costs associated with outbound commuting, including climate change.
- Build on the skills availability in LBMD.
- Take advantage of the IT skills and broadband availability in LBMD.
- More appropriate uses with C1 Mixed Use than E2 General Enterprise and Employment.
- Enhanced delivery under C1 Mixed Use than E2 General Enterprise and Employment.
- Need for more housing supply.
- Reduce both inbound and outbound commuting for more successful settlements.

#### 3.2. High Quality Employment in LBMD to Enhance the Overall Composition of Employment

The Draft CDP observes that LBMD had 4,712 resident workers (in any location) in 2016 but only 772 persons were working in the settlement, implying a jobs-to-resident workers ratio of just 0.16, the lowest of the key settlements in Meath considered in the Draft CDP (p. 58). The Draft CDP goes on to say that (p. 59) *“The settlements with the lowest jobs ratio are in the southern and eastern parts of the County where there are high volumes of outbound commuting towards Dublin for employment. This includes the East Meath settlements of Bettystown-Laytown-Mornington-Donacorney (Census Town) where the lack of any significant employment base has resulted in the town developing as a commuter settlement.”*

The Draft CDP proceeds to remark that *“Due to the proximity of the area to Drogheda and Dublin, it would be challenging to attract a large scale employer however there are opportunities to attract small-medium sized enterprises that could avail of the skilled workforce and the connectivity that the area provides to Dublin and Drogheda. Such employment would be vital to improving the jobs ratio and creating a more sustainable settlement”* (p. 110).

Drogheda itself is characterised by a low jobs-to-resident workers ratio (0.77 in 2016) in comparison with Dublin City and Suburbs (0.98) and other large settlements like Dundalk (1), Letterkenny (1.49), Athlone (1.59) and Sligo (1.89) (north of an imaginary line from Dublin and Galway, these four towns have performed strongly in attracting FDI and high quality employment during the past decade). The IDA Business and Technology Park in Drogheda opened in 2006 and quickly gained its first tenant in that year, in the form of US financial services company State Street, which today provides high quality employment for over 200 persons. However, since that early win, the US firm has remained the sole tenant of the IDA Park, whilst the four large settlements just mentioned have seen rapid growth in FDI in financial services, medical technologies and pharmaceuticals.

Nonetheless, the recent announcement that Amazon has been granted planning permission for a large-scale data centre in the Drogheda IDA Park is a welcome development (notwithstanding some reports in the local media criticising the development because it will not contribute significant new permanent jobs; however, the significance of the Amazon development is the positive signal it will send out to other investors). Such interest by potential investors may include the East Meath area, within which the designated Strategic Employment Site in LBMD with its potential to be Master Planned towards a vibrant live-and-work community, connected with Laytown/LBMD.

The detailed composition of employment in LBMD in the last two Census Years (2011 and 2016) is presented in Table 1, based on analysis of the Central Statistics Office's POWSCAR data, which enables identification of inbound and outbound commuters as well as those both living and working in settlements or any geographical delineation, such as a whole local authority area.<sup>1</sup>

The 772 total persons at work in the settlement in 2016 represented a fall of 32 from the 804 such persons in 2011, when at the same time the national economy was recovering rapidly.

The 772 jobs in LBMD in 2016 comprised 577 jobs held by people resident in County Meath and 195 held by people living outside of Meath (inbound commuters). The cohort of people employed that generally matters most to a local authority (like Meath County Council) is the former (that is, *those both living and working in the local authority area*, in this case County Meath). Accordingly, a key goal of local economic development policy is to maximise the number in that particular cohort, which in turn will serve to maximise the economic impact of employment *within* the local authority area.

The key jobs cohort of people living in Meath and working in LBMD in turn consists of (a) those both living and working in the settlement and (b) those living elsewhere in Meath and working in LBMD. To Meath County Council, (a) and (b) are probably equally important because the Council's aim is to support economic development of the whole local authority area (understandably enough). However, from a wider policy perspective, the cohort in (a) is particularly noteworthy because it affords the most direct route to maximisation of economic impact *locally within the settlement*, and entails other benefits, such as less time spent travelling to and from work (within a local authority area) and lower emissions.

Looking at Table 1, the number of people both living and working in LBMD fell by 14 during 2011-2016, while the number living elsewhere in Meath and working in the settlement rose by 21, implying a gain of just 7 in those living in Meath and working in LBMD.

**Table 1: Details of the Composition of Employment in LBMD in 2011 and 2016**

Composition of Employment in LBMD in 2011 and 2016				
Key Labour Market Variables	Census Year and Change (2011-2016)			
	2011	2016	Change	% Change
Population	10,889	11,872	983	9.0%
Living in Meath & Working in Settlement	570	577	7	1.2%
Living in Settlement & Working in Settlement	460	446	-14	-3.0%
Living Elsewhere in Meath & Working in Settlement	110	131	21	19.1%
Living Outside Meath & Working in Settlement: Inbound Commuters	234	195	-39	-16.7%
Living in Settlement & Working Outside Meath: Outbound Commuters	2,784	3,030	246	8.8%
Total Jobs in Settlement	804	772	-32	-4.0%
<b>Key Labour Market Rates</b>				
Jobs-to-Population Ratio	7.4%	6.5%	-0.9%	-11.9%
Inbound Commuter Rate	29.1%	25.3%	-3.8%	-13.2%
Outbound Commuter Rate	83.0%	84.0%	1.0%	1.2%

*Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.*

*Note: Population and demographic data for LBMD in comparative context in 2006, 2011 and 2016 are given in Table A1-Table A3 (p. 22).*

<sup>1</sup> POWSCAR is short for Place of Work, School or College Census of Anonymised Records and is part of the CSO's Census results. (although the POWSCAR data is not publicly available).

Striking in Table 1 is the number of outbound commuters from LBMD, who numbered 3,030 in 2016, dwarfing the cohorts of those living in Meath and working in the settlement (577) and the inbound commuters (195).

Also striking in the above table are the key labour market rates at the bottom of the table, derived using the preceding facts on the key labour market variables. Particularly noteworthy are: (1) the extremely low jobs-to-population ratios for LBMD, which coincided at just 7% (rounded) in 2011 and 2016 (the corresponding ratios for County Meath were 21% in each of those years and the respective ratios for the State were 39% and 41%); and (2) the extremely high outbound commuter rates for LBMD of 83% in 2011 and 84% in 2016 (the corresponding outbound commuter rates for County Meath were 54% and 55%).

It is important to be mindful of how the outbound commuter rates for LBMD are calculated in Table 1: for example, the outbound commuter rate of 84% in 2016 is given as the number of persons living in the settlement and working outside of *County Meath* (i.e. 3,030) divided by the sum of that number (3,030) and the number of persons living in Meath and working in the settlement (i.e. 577) (which comes to 3,607) (the outbound commuter rate in 2011 is calculated correspondingly, 83%). Measured in this way the outbound commuter caters for Meath County Council's (or any local authority's) objective of maximising the number of people both living and working *within* County Meath (or the local authority area in question).

Another important observation is that the outbound commuter *rate* is more important than the *number of* outbound commuters. The outbound commuter rate contextualises the absolute number of outbound commuters in the context of the number of people working within a given settlement or local authority area. It is extremely likely (practically a certainty) that the number of outbound commuters from LBMD will continue to grow in the coming years, because of the inevitable growth in the Dublin labour market. However, if the number of persons working in LBMD rises more rapidly than the number of outbound commuters from the settlement, then the outbound commuter rate for LBMD will fall.

The latter outcome is an achievable goal but is unlikely to obtain by relying on general economic growth alone (i.e. in the absence of an external stimulus to employment in LBMD). On the other hand, an external stimulus, like the Proposed Development for LBMD during 2020-2026, coupled with general economic growth, could reduce the outbound commuter rate. This is analysed further in Section 4, where the *likely direct employment impact* of the Proposed Development in 2026 is estimated.

### **3.3. Combat the Extremely High Outbound Commuting from LBMD**

LBMD is characterised by an extremely high outbound commuter rate (84% in 2016) within a county that had the highest outbound commuter rates of any local authority area outside the capital in 2011 and 2016 (54% and 55% respectively). To be fair, Meath County Council are proactively seeking to address the need for more employment to be supported *within* Meath and the Draft CDP is far-sighted in striving to facilitate the ambition contained in the Economic Development Strategy for County Meath (2014-2022). The proactive approach includes the identification of Strategic Employment Sites in LBMD and other settlements in addition to the Strategic Centres of Employment identified in the Economic Strategy (Navan, South Drogheda, Dunboyne North, Ashbourne and Kells).

However, the E2 General Enterprise and Employment zoning attaching to the Strategic Employment Site in Laytown is inappropriate for the settlement, which benefits from an appreciably large supply of skilled workers and other positive socio-economic characteristics (outlined further below). To support high quality new employment opportunities being delivered in LBMD, the more appropriate C1 Mixed Use zoning is necessary.

Another example of the proactive approach being adopted by Meath County Council towards the goal of facilitating more high quality jobs within Meath is the recent survey aimed at identifying the level of interest among outbound commuters from the County to work closer to home. In 2019 Meath and Kildare County Councils together took the initiative of conducting a commuter survey to gauge the appetite among outbound commuters to work in their counties of residence. According to results in the public domain, the average journey time for commuters is 1 hour and 9 minutes. Nearly 90% are 'very interested' in working closer to home, while 41% would be prepared to take a pay cut to work nearer to where they live. Some said their employers are flexible regarding working from home (so long as the work gets done), suggesting a latent demand for co-working spaces to cater for people who may prefer to work in such an environment rather than from home in addition to latent demand for workspaces for entrepreneurs to set up new businesses.<sup>2</sup>

### **3.4. Address the Costs Associated with Outbound Commuting, including Climate Change**

The extremely high outbound commuting from LBMD entails wider socio-economic and environmental costs as well as economic costs, including (but not limited to):

- *Getting up very early to travel to work* – the proportion of the population aged five years and over in LBMD leaving home to travel to work, school or college before 7am in 2016 was 20%, which was higher than the 18% observed in County Meath and the 13% in the country as a whole.<sup>3</sup>
- *Journey time to and from work* – the proportion of the population aged five years and over in LBMD having a journey time to work, school or college of at least 1 hour in 2016 was 19%, which was larger than the corresponding proportions of 15% and 8% in County Meath and the State.<sup>4</sup> This means that almost one-fifth of the persons aged at least 5 years resident in the settlement in 2016 had an average commute time to and from work/school/college of 1 hour+ in that year.
- Further to the preceding fact, a recent survey carried out by the AA (Automobile Association) found that almost one-third of motorists are spending more time in their daily commute compared with 12 months ago and a growing reliance on car for commuting. While the survey indicates that car reliance is on the rise (nationwide), it also found that *motorists are conscious of the negative climate and environmental implications of heavy reliance on car for commuting and are willing to switch to public transport if they felt it was reliable*. Within County Meath, Laytown benefits from a frequent and reliable train service to and from Dublin, giving commuters the opportunity to switch from car to public transport.<sup>5</sup> Dr. McCloughan believes that the addition of the proposed park-and-ride facility beside Laytown Train Station would make travelling to work by train more attractive compared with the case of no Proposed Development.
- The relatively long travel times endured by outbound commuters from LBMD, which numbered over 3,000 in 2016, mean that they have less time to devote to their families and local communities, in turn implying *less social capital locally* compared with the situation in which there were more employment opportunities closer to home.

### **3.5. Build on the Skills Availability in LBMD**

Among those both living and working in LBMD and the outbound commuters from the settlement are comparatively strong skills available locally, which in turn can be harnessed and promoted to attract much-needed quality employment in the settlement. Of particular relevance are the following facts:

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<sup>2</sup> See *The Irish Times* article on the commuter survey results (8 October 2019) (available online [here](#)).

<sup>3</sup> The details are given in Table A4 (p. 18).

<sup>4</sup> The details are set out in Table A5 (p. 18).

<sup>5</sup> An online news report on the AA survey is accessible [here](#).

- *Occupational skills* – the proportion of people living in LBMD with a background or skills in senior and professional-related occupations was 39% in 2016, higher than the 35% in County Meath and 36% in the State in that year.<sup>6</sup>
- *Persons at work by relevant industry* – the proportion of residents of LBMD working in commerce/trade/professional services was 48% in 2016, compared with the proportions of 46% and 47% observed in Meath and the State respectively in that year.<sup>7</sup>

In view of the evidence showing the appetite for outbound commuters to work closer to home in Meath, an employment stimulus like the Proposed Development is likely to attract interest from this cohort of workers, thereby enhancing the deliverability of the initiative.

### **3.6. Take Advantage of the IT Skills and Broadband Availability in LBMD**

Reinforcing the competitiveness of LBMD as a location for high quality, knowledge-oriented employment are the following facts, namely that access to broadband and IT skills are comparably high in the settlement:

- The proportion of households with a personal computer in LBMD in 2016 was 76%, which was higher than County Meath (72%) and the State (68%).<sup>8</sup>
- The proportion of households with broadband access in the settlement was 83% in 2016, larger than the 73% in Meath and the 71% in the country as a whole.<sup>9</sup>

### **3.7. More Appropriate Uses with C1 Mixed Use than E2 General Enterprise and Employment**

The Draft CDP recognises the importance of retail, car-parking and amenities in LBMD as well as the need for more jobs (pp. 110-111):

*“In order for the settlement to function in a sustainable manner, the town’s retail offer needs to be broadened. The Council recognises the importance of a high quality public realm in attracting new businesses into the area and creating a desirable living and working environment ... The Council has identified a strategic employment site in Laytown to address the sustainability issues currently experienced in this area. These lands could accommodate a potential people intensive enterprise opportunity. This would help redress the current commuter levels from the area. It is also intended that these employment lands would support a greater use of the train station in Laytown along with the provision of a public car park. This would allow for the redevelopment of the existing carpark adjacent to the playground. Potential uses of this central space adjacent to a High Amenity area on the banks of the River Nanny could be a Public Park/amenity area for the general public in line with the Public Realm Plan once completed. This would provide a central hub for the community creating an improved sense of community in Laytown and in turn creating a better live work environment while also promoting the tourism sector creating further employment in the area.”*

The envisaged park-and-ride facility as part of the Proposed Development by Fitzwilliam would enable the re-development of the existing car-park adjacent to the playground in Laytown and the public park/amenity area for the general public provided for in the Draft CDP. The park-and-ride facility would also tackle the tendency for outbound commuters to fill up the car-park during the working week.

<sup>6</sup> The details are presented in Table A6 (p. 20).

<sup>7</sup> The details are provided in Table A7 (p. 20).

<sup>8</sup> The details are given in Table A8 (p. 21).

<sup>9</sup> The details are shown in Table A9 (p. 21).

### **3.8. Enhanced Delivery under C1 Mixed Use than E2 General Enterprise and Employment**

The proposed zoning changes to the Subject Lands would incentivise the developer to deliver the Proposed Development (including the new park-and-ride facility beside Laytown Rail Station, which would serve to increase the likelihood of commuters switching to rail from car, in turn reducing the number of cars travelling beyond Laytown Train Station along the R150 Road to Julianstown early in the morning and at evenings, which has become a major traffic bottleneck nationally).

As outlined in the Draft CDP (p. 438), the E2 zoning has the 'Objective':

*"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."*

The 'Permitted Uses' for E2 zoning specified in the Draft CDP (p. 438) are:

*"Bring Banks, Builder's Providers, Childcare Facility, Car Park (incl. Park and Ride), CHP/Waste to Energy Facilities, Domestic Fuel Depot, Energy Installation, Enterprise & Business Start Ups, Enterprise/Training Centre, Factory Shop, Furniture Showroom (only where product displayed is manufactured on site), Go Kart Track, Industry – General, Industry – Light, Heavy Vehicle Park, Logistics, Mart/Co-op, Motor Repair/Servicing, Plant & Tool Hire, Recycling Facility (Civic & Amenity), Science & Technology Based Enterprise, Telecommunication Structures, Transport Depot, Warehousing, Utilities."*

The 'Open for Consideration' Uses for E2 zoning on the same page of the Draft CDP are:

*"Abattoir, Car Dismantler/Scrap Yard, Construction & Demolition Waste Recycling Facility, Garden Centre, Leisure Facilities, Motor Sales, Offices 100 – 1,000m<sup>2</sup>, Service Station, Restaurant/Café, Veterinary Surgery, Waste Recycling/Transfer/Sorting Centre, Wholesale Warehousing/Cash and Carry."*

*"Uses which are 'open for consideration' or not identified as 'permitted' under the E2 zoning objective will only be considered where they do not compromise the objective of the overall zoning objective of E2 lands, for general enterprise and employment uses."*

On the other hand, the C1 Mixed Use zoning in the Draft CDP has the 'Objective' (p. 437):

*"To provide for and facilitate mixed residential and employment generating uses."*

The 'Guidance' associated with C1 Mixed Use zoning in the Draft CDP states that (p. 437):

*"Lands identified for mixed use development are only appropriate in higher tier settlements. The objective on these lands is to provide opportunities for high density mixed use employment generating activities that also accommodate appropriate levels of residential development thereby facilitating the creation of functional 'live work' communities. These areas are generally located in proximity to high frequency public transport corridors."*

*"In order to achieve balanced development the percentage of residential development in C1 zones shall generally not exceed 50 % of the quantum of development."*

The 'Permitted Uses' of C1 Mixed Use zoning in the Draft CDP specify as follows (p. 437):

*"B & B/Guest House, Bring Banks, Childcare Facility, Children Play / Adventure Centre, Community Facility/Centre, Convenience Outlet, Cultural Facility, Education (Primary or Second Level), Education (Third Level), Enterprise Centre, Health Centre, Healthcare Practitioner, Home Based Economic Activities, Hotel/Motel/Hostel, Offices <100m<sup>2</sup>, Offices 100 to 1,000m<sup>2</sup>, Offices >1,000m<sup>2</sup>, Service Station, Place of Public Worship, Pub, Residential/Sheltered Housing, Restaurant/Café, Utilities."*

The 'Open for Consideration' Uses for C1 Mixed Use zoning on the same page of the Draft CDP are:

*"Betting Office, Car Park (incl. Park and Ride), Cinema, Conference/Event Centre, Dance Hall/Night Club, Drive Through Restaurant, Funeral Home, Garden Centre, Hospital, Industry – Light, Leisure/Recreation/Sports Facilities, Motor Sales/Repair, Offices>1,000m<sup>2</sup>, Plant & Tool Hire, Research & Development, Retirement Home/Residential Institution/Retirement Village, Science & Technology Based Enterprise, Shop, Supermarket, Take-Away/Fast Food Outlet, Telecommunication Structures, Veterinary Surgery, Wholesale Warehousing/Cash and Carry."*

Dr. McCloughan considers that the 'Guidance', 'Permitted Uses' and the 'Open for Consideration' Uses in respect of the C1 Mixed Use zoning in the Draft CDP are more appropriate for the Strategic Employment Site on the Subject Lands than the 'Objective', 'Permitted Uses' and the 'Open for Consideration' Uses pertaining to the E2 General Enterprise and Employment zoning in the Draft CDP, because the economic uses of the former are more in keeping with the skills and strategic location of LBMD, and with the longer-term vision to facilitate a thriving live-and-work community on the Subject Lands.

LBMD, the third largest town in Meath, has the potential to become a higher tier settlement during the lifetime of the next Meath CDP (2020-2026), central to which would be the delivery of significant new employment, which the Proposed Development is designed to achieve.

### **3.9. More Housing Supply**

The settlement of LBMD has grown very rapidly during 2006-2016 and includes a very young population (Table A1-Table A3). In this coming years, the demand for housing will rise, from the current cohort of young people becoming of working age. Should more jobs come on stream, the demand will rise further, and so more housing supply will be justified on the basis of serving a growing working population.

#### **3.10. Relevance of Both Inbound and Outbound Commuter Rates for Settlements**

A recent study by the UK-based Centre for Cities, entitled *What's in store? How and why cities differ for consumers* (September 2019) contains new evidence challenging the 'traditional approach' to 'high street' renewal, which has tended to concentrate on retail. Even though the report concerns cities, it is apposite to towns like LBMD, and others in Meath and elsewhere in the so-called 'commuter belt' (Kildare, Laois, Louth and Wicklow, for example) which have seen rapid population growth but little jobs growth.<sup>10</sup>

According to the study, if policy is to enable cities/towns to be vibrant places, it is vital that interventions are based on an understanding of the role they play as places of consumption and how this relates to their economic performance. The study proceeds to find that (p. 2): *"Attempts to improve the performance of urban economies by prioritising the consumption offer are unlikely to succeed. They do not address the fundamental reasons these economies are struggling or reflect the direction of the relationship between the economic performance of a place and its amenity offer."*

<sup>10</sup> The report is accessible [here](#). Centre for Cities is a charity-based research and policy institute.

Instead, according to the study (p. 2):

*“Policy must focus on making cities more attractive to businesses, especially those providing well-paid jobs. This will provide those living and working in cities with the income they need to enjoy a greater range of amenities and keep them open.”*

To do this, the report recommends that cities/towns with underperforming economies should do 3 things:

- *Improve the skills of the workforce.* Initiatives include education and training supports.
- *Invest in the consumer offering, but not as the primary tool for economic growth.* Improvement in skills and investments in amenities and culture are primary tools for attracting businesses to provide high quality employment. The study contains a noteworthy chart showing a positive correlation between the share of a city’s jobs in high-skilled exporting firms (2015) and premium amenities per 10,000 population (2018) (using data from the Office for National Statistics, the UK equivalent of the CSO). Cambridge, Oxford, Brighton and London are among the strong performing cities having both high skilled jobs and premium amenities. Slough, for example, scores strongly in skilled jobs but is judged as weak in premium amenities.
- *Remodel city/town centres away from a reliance on retail.* Alongside other policies to attract more high-skilled jobs, cities/towns should adapt their high streets to better suit customer preferences. This means providing offices for new jobs and reshaping the high street away from retail and towards more food, drink and leisure.

The study observes that Slough has ‘unusual’ commuting patterns in which most of its high skilled jobs are taken by inbound commuters living elsewhere, while most of its own residents at work commute outside of Slough to do so, meaning less consumption in the settlement compared with the more sustainable commuting pattern in which a settlement *imports a minority of its workers and exports a minority of its residents at work.*

The emphasis on creating high skilled job opportunities in settlements in the Centre for Cities report is qualified with the important observation that is worth repeating:

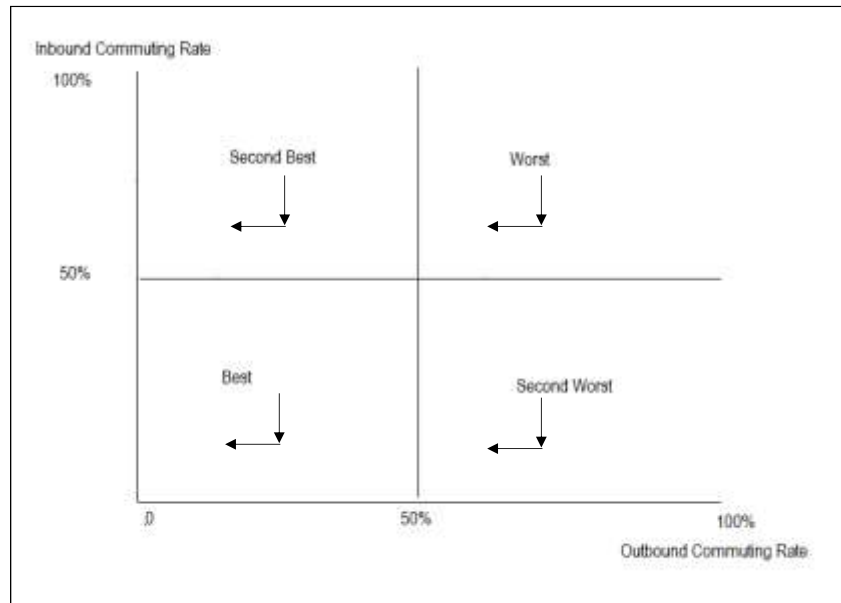
- *Economically successful towns are ones that import a minority of their workers and export a minority of their residents at work.*

This evidence-based finding in the 2019 report can be considered further in the context of this submission.

Consider the diagram in Figure 2 below, which has been drawn by Dr. McCloughan based on the finding in the Centre for Cities report of 2019 that *economically successful settlements are ones with low inbound and outbound commuter rates.* Such settlements occur in the quadrant of the chart labelled ‘Best’, and the arrows illustrate the direction of an improvement in such settlements, namely towards a lowering of both the inbound and the outbound commuter rates (i.e. a movement in a south-western direction).

The ‘Second Best’ outcome is for a settlement to have a low outbound commuter rate and a high inbound commuter rate. The ‘Worst’ scenario is having both a high inbound and a high outbound commuter rate (in other words, where the proportion of people both living and working in the settlement is low, with a consequent loss of economic impact locally). The ‘Second Worst’ scenario is for a settlement to have a high outbound commuter rate and a low inbound commuter rate. In each case, an improvement in a settlement’s performance is given by a south-western movement (an illustrative example using a selection of Meath settlements is given further below).

**Figure 2: Model for Assessing the Employment Performance of Settlements based on their Inbound and Outbound Commuter Rates**



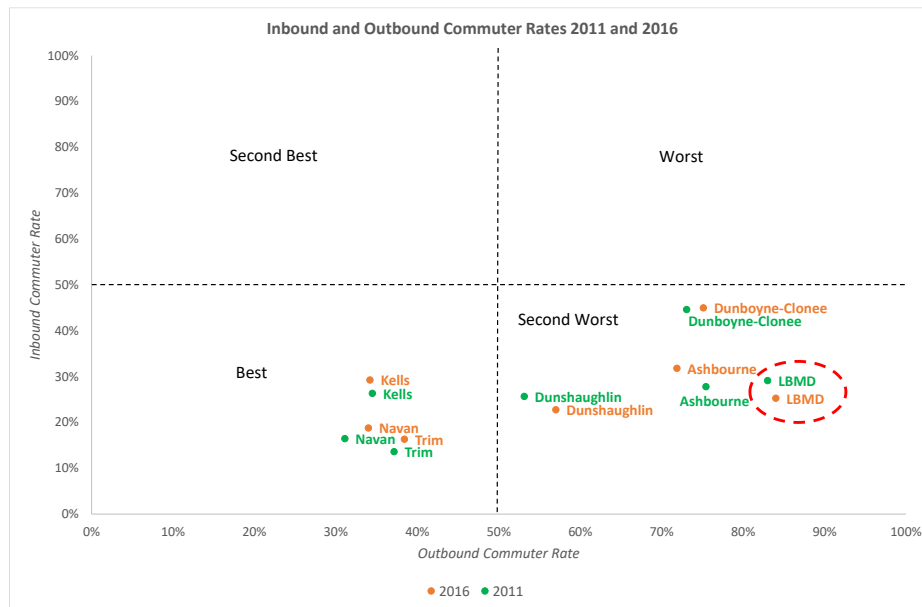
*Source: Centre for Cities (2019) report (footnote 10), PMCA Economic Consulting analysis.*

An application of the model in Figure 2 is provided in Figure 3 below, which shows a sample of settlements in Meath in 2011 and 2016 (based on PMCA analysis of POWSCAR 2011 and 2016). In interpreting the settlements' movements, recall from earlier how the outbound commuter rate in particular is measured: for example, the outbound commuter rate of 84% for LBMD in 2016 is calculated as the number of persons living in the settlement and working outside of *County Meath* (i.e. 3,030) divided by the sum of that number (3,030) and the number of persons living in Meath and working in the settlement (i.e. 577) (which comes to 3,607) (the outbound commuter rate in 2011 is calculated correspondingly, 83%) (Table 1, p. 4).

Understandably enough, Meath County Council cares particularly about the number of people living and working in Meath, like any local authority *mutatis mutandis*.<sup>11</sup> Boosting the number of jobs in a given settlement best aids the aim of tackling high outbound (and inbound) commuter rates.

<sup>11</sup> The inbound commuter rate is the number of people living outside of County Meath and working in the settlement as a percentage of the total number of persons working in the settlement.

**Figure 3: Model for Assessing the Employment Performance of Settlements based on their Inbound and Outbound Commuter Rates – Application to Selected Settlements in County Meath (2011 and 2016)**



Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.

In Figure 3 above, the outbound commuter rate for LBMD rose from 83% in 2011 to 84% in 2016, while the inbound commuter rate fell from 29% to 25% (the numbers are shown in Table 1, p. 4). These changes are reflected by a south-eastern movement in LBMD’s position in the chart, instead of the desired south-western movement. Long-term, the aim is to facilitate a south-western movement in all settlements.

Navan, Kells and Trim are noteworthy for lying in the ‘Best’ quadrant but none of these settlements experienced the desired south-western movement between 2011 and 2016. Dunshaughlin had inbound and outbound commuter rates of 23% and 57% in 2016 (which were very similar to those for County Meath, 28% and 55%) and similarly in 2011 (26% and 53% versus 27% and 56% for Meath). Accordingly, Dunshaughlin is like a ‘bell-weather’ for the overall employment performance of County Meath as a whole. Ashbourne is located between LBMD and Dunshaughlin, while Dunboyrne has a similar outbound commuter rate to Ashbourne but a higher inbound rate. Generally speaking, in a common sense approach, towns with both high inbound and high outbound commuter rates have significant mismatches in their employment performance (as though the labour market is failing these settlements) – Dunboyrne is close to the border between the ‘Second Worst’ and ‘Worst’ cases in the model outlined here.

The adverse movement of LBMD (2011-2016) (in a south-easterly direction rather than the desired south-westerly direction) further underlines the rationale for the Proposed Development.

It is also relevant to the discussion here to note that there is very little scope to develop the centre of Laytown (it is understood that Bettystown Town Centre, which in the pre-crisis years included a hotel and other services, is being re-developed, independently of the Proposed Development). That the scope for re-development of Laytown centre is very limited (a new Aldi has just been installed, which is a positive development because it replaces a previously vacant premises/site and contributes new jobs) reinforces the rationale for the Proposed Development on the Subject Lands to the west of the town.

## 4. Employment Impact of the Proposed Economic Buildings

### 4.1. Direct Employment Impact due to the New Economic Buildings by 2026

The direct employment impacts of the proposed new economic buildings to be developed on part of the Strategic Employment Site in LBMD during the lifetime of the new Meath CDP 2020-2026 are set out in Table 2. In summary, the new economic buildings will be capable of accommodating *potential* permanent employment of 834 FTEs (at capacity) and *likely* permanent employment of 556 FTEs when spare capacity is factored in (these impacts do not include the temporary employment associated with the construction of the new economic buildings, which need not be considered further in this report).

**Table 2: Proposed New Economic Buildings on Part of the Strategic Employment Site in LBMD and their Direct Employment Impacts by 2026**

<b>New Economic Building</b>	<b>Gross Area (sqm)</b>	<b>Employment Ratio (sqm)</b>	<b>Employment Density (sqm/FTE)</b>	<b>Potential Employment (FTEs)</b>	<b>Likely Employment (FTEs)</b>
<i>The Mill Enterprise Hub (Drogheda, Co. Louth)</i>	1,394	0.50	5.81	120	80
1. LBMD Enterprise Hub	1,600	0.50	5.81	138	92
2. Step-Up Enterprise Centre	1,600	0.50	5.81	138	92
3. Advance Office Building	6,000	0.50	5.81	517	344
4. Retail/Café (Eateries)/Creche/Services	2,400	0.10	5.81	41	28
<b>Total (1-4)</b>	<b>11,600</b>			<b>834</b>	<b>556</b>

*Source: Fitzwilliam, Brady Hughes Consulting and PMCA Economic Consulting analysis (information on The Mill from that organisation, see footnote 12 below).*

*Note: The Mill in Drogheda is shown in italics for illustrative purposes only because it helps to inform the employment impacts of the proposed new economic buildings (1-4).*

The employment characteristics of the proposed economic buildings – the LBMD Enterprise Hub, the Step-Up Enterprise Centre, the Advance Office Building and the fourth Building for miscellaneous economic uses (retail, café/eatery, crèche and other services/utilities providing amenities relevant to servicing the proposed live-and-work community) – are informed in part by the experience of The Mill in Drogheda shown in italics at the top of the table (for illustrative purposes only).

The Mill opened in 2014, on lands in the northern environs of Drogheda provided by Louth County Council with funding support from public bodies and businesses in the region (foreign-owned as well as indigenous enterprises). A registered charity, all of the offices in The Mill were occupied by tenants within a year (but not all of the desks within the offices were taken up, implying some spare capacity). In 2016, The Mill doubled in size to its current gross floor area of 1,394m<sup>2</sup> (15,000ft<sup>2</sup>), of which approximately 50% is available for employment (hence the employment ratio of 0.50 per m<sup>2</sup> of gross area in Table 2). The employment capacity of The Mill is 120 FTEs, which is equivalent to an employment density of 5.81m<sup>2</sup>/FTE (given as (1,394m<sup>2</sup> x 0.50)/120) (or 63ft<sup>2</sup>/FTE). Currently the tenants at The Mill together employ 80 FTEs, implying a capacity utilisation rate of two-thirds.<sup>12</sup>

<sup>12</sup> Dr. Pat McCloughan learned of these features of The Mill when he, along with Brian Hughes of Brady Hughes Consulting and a representative of Fitzwilliam, visited The Mill during this assignment in early 2020. Dr. McCloughan would like to acknowledge The Mill's Innovation and Enterprise Manager (Breannán Casey) for taking the time to show the team on behalf of Fitzwilliam around the facility and outlining its growth to date. From other consultancy work in the area, Dr. McCloughan is aware that The Mill is highly regarded as a significant asset for entrepreneurship and enterprise development.

Applying these features of The Mill to the gross areas of the economic buildings making up the Proposed Development leads to the estimates of potential and likely direct employment of 834 FTEs and 556 FTEs respectively. In what follows, we concentrate on the likely direct employment impact of 556 FTEs.<sup>13</sup>

The LBMD Enterprise Hub will be a slightly larger version of The Mill, the Step-Up Enterprise Centre will offer workspaces for firms ‘graduating’ from the LBMD Enterprise Hub, including high potential start-ups (HPSUs) and existing firms looking for workspaces in the area (it will have larger floor-plates than the LBMD Enterprise Hub), and the Advance Office Building will provide larger workspaces again, mindful of the possibility of FDI companies entering Ireland for the first time or bi-locating from Dublin.<sup>14</sup> The fourth employment building will include units for miscellaneous economic activities relevant to the vision of developing a live-and-work community on the Subject Lands, such as retail, café/eatery, crèche and other services/utilities (with a lower employment ratio compared with the other employment buildings).

Together the four new employment buildings will provide total floor space of 16,000m<sup>2</sup> (124,861ft<sup>2</sup>) with employment ‘potential’ of 834 FTEs and ‘likely’ employment of 556 FTEs (based on a capacity utilisation rate of two-thirds, observed at The Mill on the far side of Drogheda in County Louth). While one could argue that a higher capacity utilisation rate (75% or 80%) is warranted in LBMD, given its location closer to Dublin, rail services and the M1 Motorway, and the strength of demand for workspaces in the southern environs of Drogheda in County Meath, a cautious approach is adopted here based on the two-thirds capacity utilisation rate.<sup>15</sup> In the next part of the impact analysis, we focus on the likely 556 permanent FTEs due directly to the Proposed Development.

## **4.2. Impact of the Proposed Development on the Composition of Employment in LBMD**

### **4.2.1. Scenario of No Proposed Development**

In the event of no change to the E2 zoning on the Strategic Employment Site in LBMD, the developer in control of the Subject Lands will have no incentive to deliver new permanent jobs on the lands. The outcome of this scenario is shown in Table 3 below, which reproduces the key labour market variables and rates for LBMD in 2011 and 2016 from earlier Table 1 (p. 4) and adds to them the projected values for the settlement in 2026. The details of the table are outlined overleaf.

<sup>13</sup> It will be noticed in Table 2 that the economic buildings 1-3 (the LBMD Enterprise Hub, the Step-Up Enterprise Centre and the Advance Office Building) share the same employment ratio (0.50 per gross area, m<sup>2</sup>) and employment density (m<sup>2</sup> per FTE) as the Mill (5.81) whereas economic building 4 has a lower employment ratio (0.10) but the same employment density (5.81).

<sup>14</sup> The experience of the former tenant of The Mill, US fintech/payments company Yapstone, illustrates the interest or latent demand for workspaces on a flexible basis in this part of the M1 Dublin-Belfast Corridor (including from FDI companies). Yapstone became a multinational enterprise when it established operations in Drogheda in or about 2012. It moved to The Mill after that centre opened in 2014. After a couple of years of rapid growth, Yapstone sought larger premises in Drogheda to accommodate more employees. It experienced difficulty in finding suitable step-up premises in the town but in 2016 opened a new premises in the M1 Retail Park in Drogheda (16,000ft<sup>2</sup>/1,486m<sup>2</sup>), where it currently employs 100+ persons and is the company’s international headquarters. It is relevant to add here that The Mill’s current tenants include a number of small/first-time multinational/FDI companies who may be in need of step-up/graduator space in the area in the coming years. Dr. McCloughan has also learned that there is regular contact between the IDA and The Mill in respect of meeting new demand from IDA clients.

<sup>15</sup> Evidence of the strong demand for workspaces in the Meath environs of Drogheda is provided, for example, in the growth of City North Business Park on Junction 7 of the M1 Motorway, where there are a variety of knowledge-oriented activities.

**Table 3: Impact of No Proposed Development on the Composition of Employment in LBMD in 2026**

Composition of Employment in LBMD in 2011, 2016 and 2026 (Projected)			
Key Labour Market Variables	Census Year		
	2011	2016	2026
Population	10,889	11,872	13,372
Living in Meath & Working in Settlement	570	577	742
Living in Settlement & Working in Settlement	460	446	526
Living Elsewhere in Meath & Working in Settlement	110	131	216
Living Outside Meath & Working in Settlement: Inbound Commuters	234	195	151
Living in Settlement & Working Outside Meath: Outbound Commuters	2,784	3,030	3,589
Total Jobs in Settlement	804	772	893
Jobs due to General Economic Growth			893
Jobs due to the Proposed Development			0
<b>Key Labour Market Rates</b>			
Jobs-to-Population Ratio	7%	7%	7%
Inbound Commuter Rate	29%	25%	17%
Outbound Commuter Rate	83%	84%	83%

Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.

Consider firstly in Table 3 the total number of jobs in the settlement. While this number fell from 804 in 2011 to 772 in 2016 (when the national economy was transitioning from crisis to recovery), it is unlikely that the contraction in employment in LBMD witnessed between 2011 and 2016 will repeat itself during the longer-term period 2016-2026. The likelihood is that there will be growth in jobs by 2026 due to general economic growth (independently of the Proposed Development) (for example, the new Aldi store in Laytown which opened in February 2020 and it is expected that the re-development of Bettystown Town Centre will be completed by 2026).<sup>16</sup>

To estimate the likely number of jobs in LBMD due to general economic growth (independently of the Proposed Development), reference may be made to the rate of jobs growth that occurred in County Meath during 2011-2016. In 2011, there were 38,822 persons at work in Meath, which grew to 41,757 in 2016, representing average annual growth of 1.5% on a compound average growth rate (CAGR) basis. This rate of increase was modest compared with the State (CAGR 2.2%). On the basis of the 1.5% CAGR observed in Meath 2011-2016, it is estimated that the number of jobs in LBMD in 2026 will be 893 (due to general economic growth), as shown in Table 3 above.<sup>17</sup>

Next, to estimate the number of persons living in Meath (both in LBMD and elsewhere in the County) and working in the settlement in 2026, we first note from Table 3 that the 570 such persons in 2011 constituted 71% of the total 804 jobs in LBMD in that year, which grew to 75% in 2016 (based on the 577 persons living in Meath and working in the settlement and the 772 total jobs in LBMD in that year). At the rate of growth in the proportion of 71% in 2011 to the 75% in 2016 (1.1% CAGR), the corresponding proportion in 2026 would be 83%, giving the projection of 742 persons living in Meath and working in LBMD in 2026 (i.e. 0.83 times the 893) (figures subject to rounding).

<sup>16</sup> In addition, the new Spine Road (close to Bettystown Town Centre) linking Bettystown and Laytown is proceeding with news that Meath County Council has gone to tender on the scheme ('Council Update', *The Meath Coaster*, February 2020, p. 18).

<sup>17</sup> The headline target of the Economic Development Strategy for County Meath (2014-2022) is to facilitate an additional 7,500 jobs in the County by 2022 (compared with 2011). At the 1.5% CAGR observed during 2011-2016, the number of jobs would grow to 45,573 in 2022, but this would mean undershooting the 7,500 extra jobs by 749. This possibility further rationalises the importance of economic stimuli like the Proposed Development to Meath's employment in the coming years.

Within the projected 742 persons living in Meath and working in LBMD in 2026, it is estimated that there will be 526 persons both living and working in the settlement in that year (based on taking 71% of the 742, which reflects the trend in the proportion between 2011 and 2016, namely 81% and 77% respectively or -0.9% CAGR) and that there will be 216 persons living elsewhere in Meath and working in LBMD in 2026 (based on taking the remaining 29% of the 742, figures subject to rounding). In turn, the estimated total 893 persons at work in the settlement in 2026 due to general economic growth, within which the 742 persons living in Meath and working in LBMD, implies that there will be 151 inbound commuters (living outside of County Meath but working in the settlement) at work in LBMD in 2026 (the reduction in the number of inbound commuters follows the declining trend observed during 2011-2016).

Coming next to the outbound commuters, the CAGR during 2011-2016 in the number of outbound commuters from LBMD was 1.7% (there were 2,784 outbound commuters in 2011 and 3,030 outbound commuters in 2016). At that rate of growth (1.7% CAGR), the number of outbound commuters would increase to 3,589 in 2026 (the numbers are shown in Table 3).

The projections lead to the following key labour market rates for LBMD in 2026 in the scenario of No Proposed Development (shown in the bottom part of Table 3 above):

- Jobs-to-population ratio of 7% (based on the projected population for the settlement of 13,372 in 2026, as given in the Draft CDP) (thus the jobs-to-population ratio for LBMD would remain at the extremely low rate of 7% in 2026, the same as in 2011 and 2016).
- Inbound commuter rate of 17%, which continues the downward trend during 2011-2016.
- Outbound commuter rate of 83%, which remains extremely high.

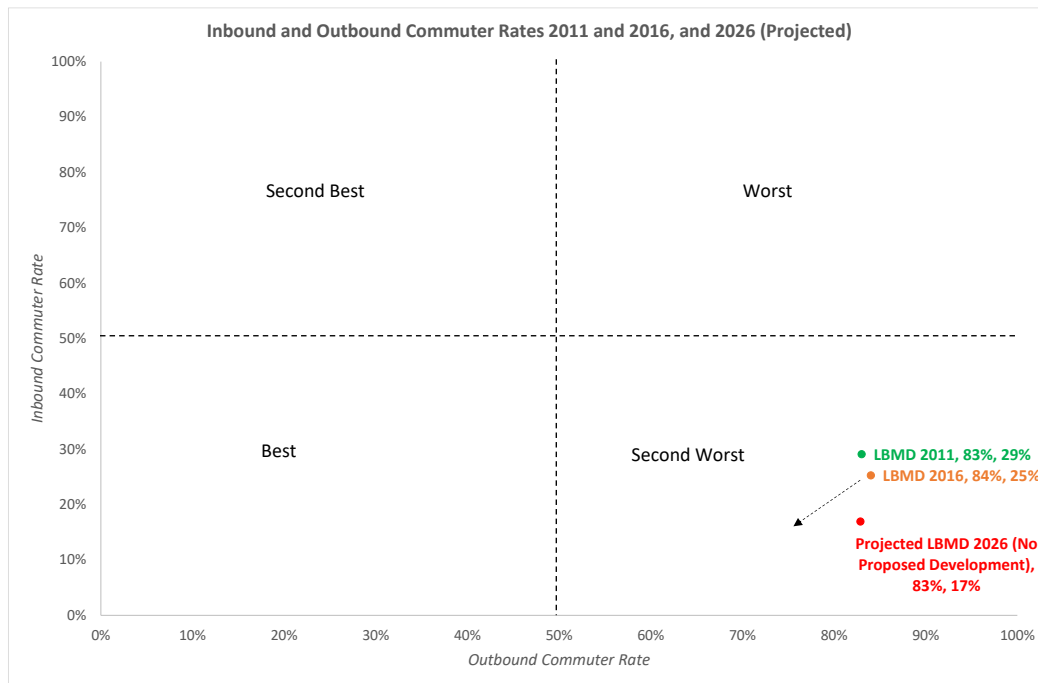
Thus, in the event of No Proposed Development, the composition of employment in LBMD is projected to remain highly unbalanced in 2026, with continuation of the extremely high outbound commuting rate (83%) and an extremely low job-to-population ratio persisting (7%).

The outbound and inbound commuting rates for LBMD in 2026, under the scenario of No Proposed Development, compared with the inbound and outbound commuter rates observed in the settlement in 2011 and 2016, are illustrated in Figure 4 overleaf.

While the inbound commuter rate is projected to fall in 2026, the outbound commuter rate is likely to remain extremely high (83%). In other words, the movement in LBMD's position within the 'Second Worst' quadrant would only be a very marginal south-western one. The preferred movement required for the settlement is a reduction in *both* the inbound and the outbound commuter rates, which would represent an unambiguous improvement in employment for LBMD as indicated by the dashed arrow in black (i.e. where the settlement needs to move to over the next decade).

Summing on the scenario where the Proposed Development would not take place, relying on general economic growth (absent the economic stimulus of the Proposed Development) will in all likelihood be insufficient to address the highly imbalanced composition of employment in LBMD, where a significant uplift in the number of persons at work in the settlement is needed (in addition to employment growth due to general economic growth).

**Figure 4: Impact of No Proposed Development on the Outbound and Inbound Commuting rates for LBMD in 2026 Compared with the Outbound and Inbound Commuting Rates Observed in 2011 and 2016**



*Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis (see the inbound and outbound commuter rates in Table 3, p. 15). Note: The dashed arrow in black illustrates the preferred/ideal movement in LBMD from its position in 2016 to 2026.*

#### 4.2.2. Scenario of Proposed Development

The developer will have an incentive to deliver employment on the Strategic Employment Site in LBMD, as intended in the Draft CDP 2020-2026, in the event that the zoning of the lands are amended from E2 General Enterprise and Employment to C1 Mixed Use along with the other proposed amendments outlined at the beginning of this report. The likely impact of this case – based on the additional 556 FTEs in 2026 established earlier in Table 2 (p. 13) – on the composition of employment in the settlement in 2026 is set out in Table 4 below.

On top of the estimated 893 FTEs in LBMD in 2026 due to general economic growth (as outlined for the No Proposed Development scenario), the Proposed Development would add an extra 556 FTEs, bringing the projected number of persons at work in the settlement to 1,449 in 2026. Compared with the 772 persons at work in LBMD in 2016, there would be an extra 677 persons working in the settlement in 2026, of which 556 or 82% of the jobs growth would be due to the Proposed Development, with the remaining 121 jobs (18%) being due to general economic growth (independently of the Proposed Project).

Within the projected total of 1,449 persons at work in LBMD in 2026, there would be 1,204 persons living in Meath and working in the settlement, within which 930 persons both living and working in LBMD (1,204 times the 77% proportion in respect of those both living and working in LBMD derived earlier) and 273 persons living elsewhere in Meath and working in the settlement (1,204 multiplied by the remaining 23%, figures subject to rounding). This in turn implies that there would 245 inbound commuters working in LBMD in that year (1,449 minus 1,204), resulting in an inbound commuting rate of 17%.

Independently of the inbound commuters and those living in Meath and working in LBMD, there would be 3,589 outbound commuters living in the settlement (based on the trend in the number of outbound commuters during 2011-2016). This is the same number of outbound commuters as in the scenario of No Proposed Development (Table 3) but importantly the *outbound commuter rate* would be significantly reduced to 75% in 2026 (due to the projected 1,204 persons living in Meath and working in LBMD, which would act in part as a counter-balance to the outbound commuters).

**Table 4: Impact of the Proposed Development on the Composition of Employment in LBMD in 2026**

Key Labour Market Variables	Composition of Employment in LBMD in 2011, 2016 and 2026 (Projected)		
	Census Year		
	2011	2016	2026
Population	10,889	11,872	13,372
Living in Meath & Working in Settlement	570	577	1,204
Living in Settlement & Working in Settlement	460	446	930
Living Elsewhere in Meath & Working in Settlement	110	131	273
Living Outside Meath & Working in Settlement: Inbound Commuters	234	195	245
Living in Settlement & Working Outside Meath: Outbound Commuters	2,784	3,030	3,589
Total Jobs in Settlement	804	772	1,449
Jobs due to General Economic Growth			893
Jobs due to the Proposed Development			556
<b>Key Labour Market Rates</b>			
Jobs-to-Population Ratio	7%	7%	11%
Inbound Commuter Rate	29%	25%	17%
Outbound Commuter Rate	83%	84%	75%

*Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis.*

*Note: The 556 FTEs due to the Proposed Development is based on the earlier Table 2 (p. 13) (likely direct employment impact).*

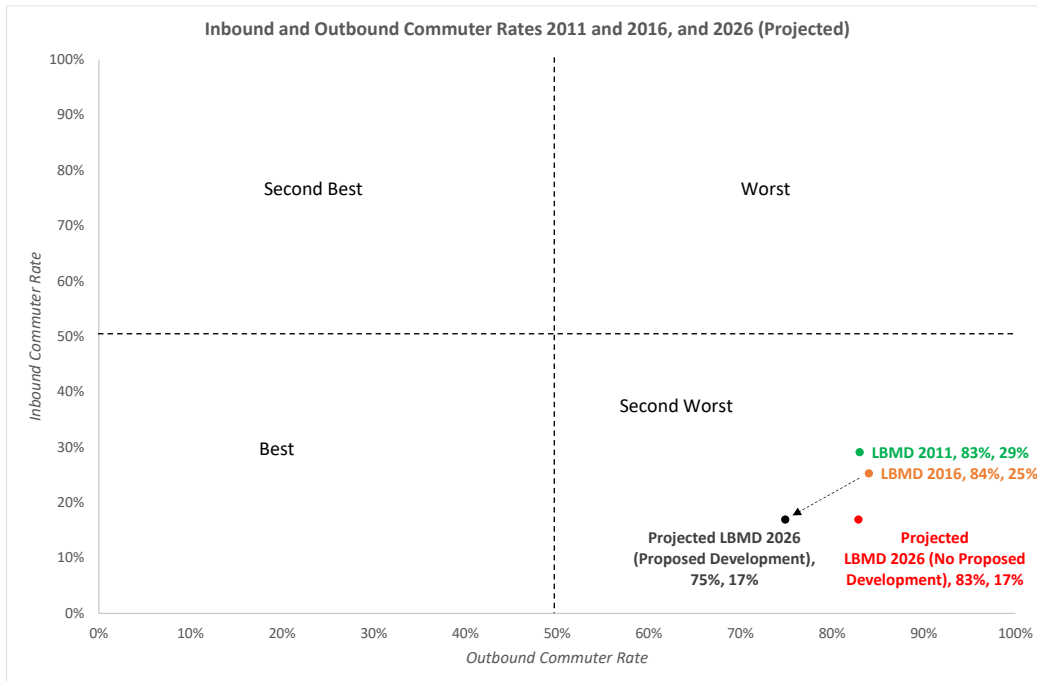
In summary, the likely 556 FTEs due directly to the Proposed Development (established in Table 2, p. 13) would have an appreciably large and positive effect on the composition of employment in LBMD:

- The jobs-to-population would increase from 7% in 2016 to 11% in 2026 (a significant movement given that the jobs-to-population ratio was also 7% in 2011).
- The inbound commuter rate would fall from 25% in 2016 to 17% in 2026.
- The outbound commuter rate would decline from 84% in 2016 to 75% in 2026.

The impact of the Proposed Development on the inbound and outbound commuter rates for the settlement of LBMD in 2026 is illustrated in Figure 5. In 2016, LBMD had an inbound commuter rate of 25% and an exceedingly high outbound commuter rate of 84% (the corresponding rate for County Meath was 55%). While the inbound commuter rate fell during 2011-2016, the outbound commuter rate in 2016 was higher than the rate observed in 2011 (83%). By facilitating the creation of appreciably more high quality employment in LBMD (556 FTEs), the Proposed Development would lead to a favourable south-western movement for LBMD in Figure 5.

While the *absolute number* of outbound commuters will continue to be high (Dublin is likely to experience continued jobs growth), the stimulus of the additional 556 persons at work in LBMD due to the Proposed Development will significantly reduce the *rate* of outbound commuting (to 75% in 2026). It is possible/likely that some or many of the 556 new jobs due to the Proposed Development will be taken by outbound commuters, in which case the projected number of outbound commuters will be lower than the 3,589 in Table 4 and accordingly the outbound commuter rate will be even lower than the 75% rate shown in that table (reducing the outbound commuter *rate* is an achievable goal).

**Figure 5: Impact of the Proposed Development on the Outbound and Inbound Commuting rates for LBMD in 2026 Compared with the Outbound and Inbound Commuting Rates Observed in 2011 and 2016**



*Source: CSO POWSCAR 2011 and 2016, PMCA Economic Consulting analysis (see the inbound and outbound commuter rates in Table 4, p. 18).*

## 5. Conclusions and Recommendation

This report by Dr. Pat McCloughan on behalf of Fitzwilliam Real Estate Capital forms part of a submission by Fitzwilliam to Meath County Council regarding the Draft Meath County Development Plan 2020-2026. Fitzwilliam is in control of certain lands in Laytown adjacent to Laytown Rail Station, which extend to 45.5 hectares (112.4 acres) and include the Strategic Employment Site identified for Laytown-Bettystown-Mornington-Donacarne in the Draft CDP. That the Draft CDP identifies nine such sites, in addition to the Strategic Centres of Employment in Navan, South Drogheda, Dunboyne North, Ashbourne and Kells, is very welcome, and shows the Council's commitment to the central aim of the Economic Development Strategy for County Meath (2014-2022) – *to facilitate more high quality employment in Meath*.

However, the zoning of the Strategic Employment Site in LBMD (E2 General Enterprise and Employment) is incompatible with the need to deliver high quality jobs in the settlement during the lifetime of the New Plan. A re-zoning to C1 Mixed Use would enable greater flexibility and incentivise the delivery of significant new high quality employment in a part of Meath that has grown very rapidly to become the third largest settlement in the County (after Navan and Ashbourne) but with very little jobs per resident.

The Proposed Development includes the delivery of significant new employment buildings on the Strategic Employment Site, together with residential units, enabling a new live-and-work community, which would be a major asset for the LBMD and East Meath more widely.

It is estimated in this report that, in the absence of the Proposed Development, the number of persons at work in the settlement of LBMD will be 893 in 2026, up from the 772 jobs observed in 2016, which represented a fall on the 804 jobs in 2011. The uplift in the number of jobs in 2026 will be due to general economic growth likely to prevail between now and then, notwithstanding international risks (Brexit, trade issues etc.). However, the higher the number of people working in LBMD in 2026, in the absence of the Proposed Development, will be insufficient to address the highly imbalanced composition of employment in the town. It is projected that, without the Proposed Development, the ratio of jobs-to-population will remain extremely low at 7% (the same level as observed in 2011 and 2016) and that the outbound commuter rate will be 83% (it was 84% in 2016 and 83% in 2011, meaning that LBMD is characterised by an extremely high outward commuting rate).

On the other hand, it is projected that the Proposed Development on the Strategic Employment Site will likely lead to an *additional* 556 persons at work in LBMD, *over-and-above* the 893 jobs due to general economic growth expected to obtain in any event. In turn, the estimated 1,204 persons living in Meath and working in the settlement (that element of employment of particular importance to Meath County Council) will lead to a significant reduction in the outbound commuter rate from 83% in the absence of the Proposed Development to 75%, and the jobs-to-population ratio will increase to 11%, which while still very low is nevertheless moving in the right direction (the latter estimate reflects the projected population for LBMD in 2026 of 13,372 persons in the Draft CDP). The Proposed Development therefore has the capacity to be a 'game-changer' in enabling much-needed new high quality employment for LBMD.

Accordingly, it is recommended that the Council gives consideration to amending the zoning of the Strategic Employment Site in Laytown from E2 General Enterprise and Employment to C1 Mixed Use (including the parcel of land under the control of Fitzwilliam between the Strategic Employment Site and Laytown Train Station) and to zoning part of the Subject Lands adjacent to East Meath United FC to enable further development of sports and recreational facilities, and to WL White Lands zoning of the balance of the Subject Lands to protect them from possible inappropriate development and to permit appropriate connectivity between the developed lands and Laytown. In view of the scale and strategic importance of the Subject Lands, it is recommended that they be subject to a Master Plan ('MP2 Laytown').

## Annex of Supplementary Information

**Figure A1: Detail of Additional Lands under the Control of Fitzwilliam adjacent to the Subject Lands**



*Source:* Fitzwilliam.

*Note:* It is proposed that the parcel of land indicated in pink in this map (under the control of Fitzwilliam) is zoned C1 Mixed Use, in line with the rest of the Subject Lands in the settlement of LBMD under the control of Fitzwilliam.

**Table A1: Population in LBMD, Co. Meath and the State in 2006, 2011 and 2016**

Location	Population					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
LBMD	8,978	10,889	11,872	21.3%	9.0%	32.2%
Meath	162,823	184,135	195,044	13.1%	5.9%	19.8%
State	4,239,318	4,588,252	4,761,865	8.2%	3.8%	12.3%

*Source: CSO Census data, PMCA Economic Consulting analysis.*

*Note: In 2006, the Census settlement of LBMD was known as LBM (Laytown-Bettystown-Mornington) and had a population of 8,978 persons. During 2006-2016 the population of the settlement grew by almost one-third (32%), exceeding the corresponding rate of growth in Meath (20%) and the State (12%). On the other hand, the number of jobs in LBMD declined from 804 in 2011 to 772 in 2016 (Table 1, p. 4) which underlies the urgent need to create more (high quality) employment opportunities in the town.*

**Table A2: Old Age Dependency Ratio in LBMD, Co. Meath and the State in 2006, 2011 and 2016**

Location	Old Age Dependency Ratio					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
LBMD	10.5%	12.0%	15.5%	14.5%	28.3%	46.9%
Meath	11.7%	13.5%	16.6%	15.3%	23.3%	42.2%
State	16.1%	17.4%	20.4%	8.2%	17.4%	27.1%

*Source: CSO Census data, PMCA Economic Consulting analysis.*

*Note: The old age dependency ratio is the population aged 65 years or more divided by the population aged 15-64 years (normal working age).*

**Table A3: Youth Age Dependency Ratio in LBMD, Co. Meath and the State in 2006, 2011 and 2016**

Location	Youth Dependency Ratio					
	Census Year			% Change		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
LBMD	36.6%	43.4%	44.1%	18.6%	1.6%	20.4%
Meath	34.2%	38.3%	39.0%	12.1%	2.0%	14.3%
State	29.7%	31.9%	32.3%	7.2%	1.3%	8.6%

*Source: CSO Census data, PMCA Economic Consulting analysis.*

*Note: The youth dependency ratio is the population aged 0-14 years divided by the population aged 15-64 years (normal working age).*

**Table A4: Population Aged 5 Years and Over by Time of Leaving Home to Travel to Work, School or College in LBMD, Co. Meath and the State in 2016**

Population Aged 5 Years and Over by Time Leaving Home to Travel to Work, School or College (2016)						
Time Leaving Home	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Before 06:30	763	9.9%	11,165	8.7%	170,281	5.7%
06:30-07:00	764	9.9%	12,146	9.5%	210,930	7.1%
07:01-07:30	769	9.9%	13,435	10.5%	270,733	9.1%
07:31-08:00	928	12.0%	17,471	13.7%	440,220	14.9%
08:01-08:30	1,706	22.0%	23,820	18.7%	616,905	20.8%
08:31-09:00	1,531	19.8%	25,595	20.1%	648,295	21.9%
09:01-09:30	500	6.5%	11,499	9.0%	237,247	8.0%
After 09:30	455	5.9%	7,563	5.9%	215,199	7.3%
Not stated	323	4.2%	4,929	3.9%	152,740	5.2%
<b>Total</b>	<b>7,739</b>	<b>100.0%</b>	<b>127,623</b>	<b>100.0%</b>	<b>2,962,550</b>	<b>100.0%</b>
<b>Leaving Home before 07.00am</b>	<b>1,527</b>	<b>20%</b>	<b>23,311</b>	<b>18%</b>	<b>381,211</b>	<b>13%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.

**Table A5: Population Aged 5 Years and Over by Journey Time to Work, School or College in LBMD, Co. Meath and the State in 2016**

Population Aged 5 Years and Over by Journey Time to Work, School or College (2016)						
Journey Time	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Under 15 mins	2,088	27.0%	39,464	30.9%	956,370	32.3%
1/4 hour - under 1/2 hour	1,640	21.2%	30,434	23.8%	853,885	28.8%
1/2 hour - under 3/4 hour	1,320	17.1%	21,010	16.5%	511,843	17.3%
3/4 hour - under 1 hour	774	10.0%	10,340	8.1%	174,254	5.9%
1 hour - under 1 1/2 hours	1,066	13.8%	13,886	10.9%	179,233	6.0%
1 1/2 hours and over	402	5.2%	4,775	3.7%	67,066	2.3%
Not stated	449	5.8%	7,714	6.0%	219,899	7.4%
<b>Total</b>	<b>7,739</b>	<b>100.0%</b>	<b>127,623</b>	<b>100.0%</b>	<b>2,962,550</b>	<b>100.0%</b>
<b>Journey Time of 1 Hour or More</b>	<b>1,468</b>	<b>19%</b>	<b>18,661</b>	<b>15%</b>	<b>246,299</b>	<b>8%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A6: Population at Work or Unemployed in LBMD, Co. Meath and the State in 2016

Occupation	Persons at Work or Unemployed by Occupation (2016)					
	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Managers Directors and Senior Officials	535	10.0%	8,003	8.6%	169,032	7.4%
Professional Occupations	809	15.2%	14,306	15.4%	393,608	17.3%
Associate Professional and Technical Occupations	717	13.5%	10,350	11.2%	248,413	10.9%
Administrative and Secretarial Occupations	623	11.7%	10,362	11.2%	228,032	10.0%
Skilled Trades Occupations	551	10.3%	14,161	15.3%	316,313	13.9%
Caring Leisure and Other Service Occupations	493	9.3%	7,003	7.6%	166,163	7.3%
Sales and Customer Service Occupations	378	7.1%	5,964	6.4%	155,030	6.8%
Process Plant and Machine Operatives	383	7.2%	7,366	7.9%	162,641	7.2%
Elementary Occupations	418	7.8%	7,857	8.5%	200,287	8.8%
Not stated	422	7.9%	7,318	7.9%	233,084	10.3%
<b>Total</b>	<b>5,329</b>	<b>100.0%</b>	<b>92,690</b>	<b>100.0%</b>	<b>2,272,603</b>	<b>100.0%</b>
<b>Senior and Professional-Related Occupations</b>	<b>2,061</b>	<b>39%</b>	<b>32,659</b>	<b>35%</b>	<b>811,053</b>	<b>36%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.

Table A7: Population at Work by Industry in LBMD, Co. Meath and the State in 2016

Industry	Persons at Work by Industry (2016)					
	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Agriculture forestry and fishing	18	0.4%	3,734	4.5%	89,116	4.4%
Building and construction	238	5.0%	6,147	7.4%	101,849	5.1%
Manufacturing industries	412	8.7%	9,568	11.5%	229,548	11.4%
Commerce and trade	1,208	25.6%	20,332	24.4%	480,117	23.9%
Transport and communications	721	15.3%	7,975	9.6%	171,194	8.5%
Public administration	269	5.7%	4,776	5.7%	106,797	5.3%
Professional services	1,063	22.5%	17,895	21.5%	471,656	23.5%
Other	788	16.7%	12,832	15.4%	356,364	17.8%
<b>Total</b>	<b>4,717</b>	<b>100.0%</b>	<b>83,259</b>	<b>100.0%</b>	<b>2,006,641</b>	<b>100.0%</b>
<b>Persons Working in Commerce/Trade/Professional Services</b>	<b>2,271</b>	<b>48%</b>	<b>38,227</b>	<b>46%</b>	<b>951,773</b>	<b>47%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.

**Table A8: Number of Households with a Personal Computer in LBMD, Co. Meath and the State in 2016**

Number of Households with a Personal Computer (2016)						
Personal Computer	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Yes	2,963	76.0%	46,164	72.3%	1,160,603	68.4%
No	821	21.1%	15,969	25.0%	478,487	28.2%
Not stated	114	2.9%	1,728	2.7%	58,575	3.5%
<b>Total</b>	<b>3,898</b>	<b>100.0%</b>	<b>63,861</b>	<b>100.0%</b>	<b>1,697,665</b>	<b>100.0%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.

**Table A9: Number of Households with Internet Access in LBMD, Co. Meath and the State in 2016**

Number of Households with Internet Access (2016)						
Internet Access	LBMD		Co. Meath		State	
	No.	%	No.	%	No.	%
Broadband	3,248	83.3%	46,851	73.4%	1,200,067	70.7%
Other	147	3.8%	5,495	8.6%	131,676	7.8%
No	393	10.1%	10,022	15.7%	312,982	18.4%
Not stated	110	2.8%	1,493	2.3%	52,940	3.1%
<b>Total</b>	<b>3,898</b>	<b>100.0%</b>	<b>63,861</b>	<b>100.0%</b>	<b>1,697,665</b>	<b>100.0%</b>

Source: CSO Census data, PMCA Economic Consulting analysis.