Chapter 05

Economic Activity

'In its favour however Monaghan has a particularly entrepreneurial population with 34% of the workforce self employed and the highest rate of new business start ups in Ireland'

5.0 Introduction

The perception of County Monaghan as having full employment has tended to mask some of the difficulties in providing quality jobs. The county's industrial base is quite narrow and is particularly dependant on the food and furniture sectors. Many of these businesses are confined to low skilled manual workers. Much of production is based upon high volume and low margins and this is reflected by the fact that the country's gross output per person is approximately one third of the national average. To date, inward investment levels have been low while there are major international agencies operating throughout the country.

In its favour however Monaghan has a particularly entrepreneurial population with 34% of the workforce self employed and the highest rate of new business start ups in Ireland. This is a very important natural asset and should be encouraged through further grants and support.

In 1999, the Government committed to ensure the spread of economic growth in the 'White Paper on Rural Development: Ensuring the Future- A Strategy for Rural Development in Ireland'. The White Paper stated that rural areas refer to 'people living in the open countryside, in coastal areas, towns and villages and in smaller urban areas outside the five major urban areas'. The White Paper is an 'overarching' strategy on rural development which formulates a 'coherent strategy for rural development that identifies the policy responses at national, regional and local levels which will most effectively address the issues of economic and social underdevelopment in rural areas'.

It is therefore an aim of this plan to provide a healthy and vibrant level of economic activity in the county. There are a large number of international agencies operating throughout the country and despite Monaghan's strategic location, the county is not utilising its competitive advantages. It is vital that Monaghan County Council provides the right infrastructure and conditions to attract more companies to the county that require skilled and professional labour, which will provide the engine for increased economic activity.

Employment Structure

5.1 Employment 1996 - 2002

Table 5.1: Population Aged 15+ by Economic Status, 2002

	Monaghan		BMW [22]		National	
	Persons	%	Persons	%	Persons	%
Pop. aged 15+	40,819	-	808,638	-	3,089,775	-
Pop. at work	21,101	51.7	407,251	50.4	1,641,587	53.1
Pop. 1st time job seekers	290	0.7	5881	0.7	21,147	0.7
Pop. Unemployed	2,037	5.0	41,274	5.1	138,199	4.5
Pop. Students	4,317	10.6	91,234	11.3	350,774	11.4
Pop. Home duties	6,349	15.6	121,233	15.0	438,986	14.2
Pop. Retired	4,482	11.0	93,743	11.6	333,255	10.8
Pop. Unable to work	1,918	4.7	38,741	4.8	130,255	4.2
Pop. Other	325	0.8	9,281	1.1	35,572	1.2

Source: County Monaghan- Baseline Data Report, 2002

In County Monaghan in 2002, of the 40,819 persons aged 15 years and over, 51.7% were at work. This figure was higher than that of the BMW Region figure of 50.4% and lower than the national average of 53.1%. Unemployment in the county during the same period was 5.0%, which was higher than the national average of 4.5% and lower than the BMW Region figure of 5.1%.

[22] BMW Region includes the Border counties of Monaghan, Cavan, Sligo, Louth, Leitrim and Donegal, the Midland counties of Longford, Westmeath, Offaly and Laois and the Western counties of Galway, Mayo and Roscommon

Table 5.2: Population Numbers and Percentages Aged 15+ by Employment Sector, 2002

	Monaghan		BMW Region		National	
	Persons	%	Persons	%	Persons	%
Total Persons	21101	-	407251	-	1641587	-
Agriculture	2856	13.5	37798	9.3	97281	5.9
Building & Construction	2250	10.7	43334	10.6	149271	9.1
Manufacturing, Electrical & Gas	4076	19.3	72031	17.7	262224	16.0
Services	9472	44.0	196813	47.9	-	54.0
Other	2647	12.5	57275	14.1	247279	15.1

Source: County Monaghan Baseline Data Report 2002

A breakdown of those working within the broad employment groups (as outlined in Table 5.2 above) illustrates that although agriculture remains important to the county's economy, it is not the primary employer. During the period 1996 - 2002, 13.5 % of the working population were directly employed in the agriculture sector. This figure was higher than the BMW Regional figure of 9.3% and the national average of 5.9% of the same sector.

The building and construction sector accounted for 10.7% of the working population for County Monaghan during the same period. This figure was also marginally higher than the BMW Region of 10.6% and the national average of 9.1%. The number of people employed in manufacturing (19.3% of the working population) was also higher than the BMW Regional figure of 17.7% and the national average of 16%.

The service sector (including commerce, transport, public administration and professional services) was the most important employer in the Monaghan economy, accounting for 44.0 % of the total working population. This figure was however lower than the BMW Regional figure of 47.9 % and the national average of 54.0 % for the same sector.

Other employers accounted for 12.5% of the working population. This figure was lower than the BMW Regional figure of 14.1% and the national average of 15.1% of the same sector.

While it is extremely difficult to accurately forecast future employment patterns, a number of broad trends are anticipated. FAS/ ERSI have estimated that over the next decade, four sectors (high tech manufacturing, other market services and health/ education) will account for some 75% of total employment growth. It is not anticipated that there will be a net gain in manufacturing over this period, but that job losses in traditional manufacturing will be offset by gains in high technology areas[23]. It is anticipated that employment in the traditional agriculture sector will continue to decline, resulting in opportunities in farm diversification and off farm employment becoming critical to the survival of many rural communities.

Monaghan Leisure Centre

[23] Audit of innovation in the BMW Region 2004

Affluence & Deprivation

5.1.1 Affluence and Deprivation in County Monaghan

The Deprivation Index provides a single measurement of the overall Affluence/Deprivation of an area, taking into account social class, together with demographic and labour market deprivation (based on Census data). The Affluence/ Deprivation Scores range from -50 to 50; with -50 being extremely deprived and 50 being extremely affluent. The scores are classified as "Affluent", "Disadvantage", "Marginally above Average" and "Marginally below Average".

County Monaghan has experienced an improvement in the overall affluence of the area from -3 in 1991 to 11.2 in 2002. This was an increase of 14.2 in the affluence / Deprivation Score of Co. Monaghan. Despite this increase the deprivation Index for Monaghan County remains lower than that of both the BMW Region and national average

Table 5.3: Deprivation levels in County Monaghan Deprivation Index

DEPRIVATION INDEX			
	1991	2002	Increase
Monaghan County	-3	11.2	14.2
BMW Region	-1.9	13	14.9
National	1.9	17.4	15.4

Source: County Monaghan Baseline Data Report, 2002

No Electoral Divisions (EDs) in County Monaghan scored as being "Affluent", with the majority being "Marginally below Average" and "Marginally above Average". No EDs scored as being extremely disadvantaged; however 13 EDs scored as being "Disadvantaged"[24]

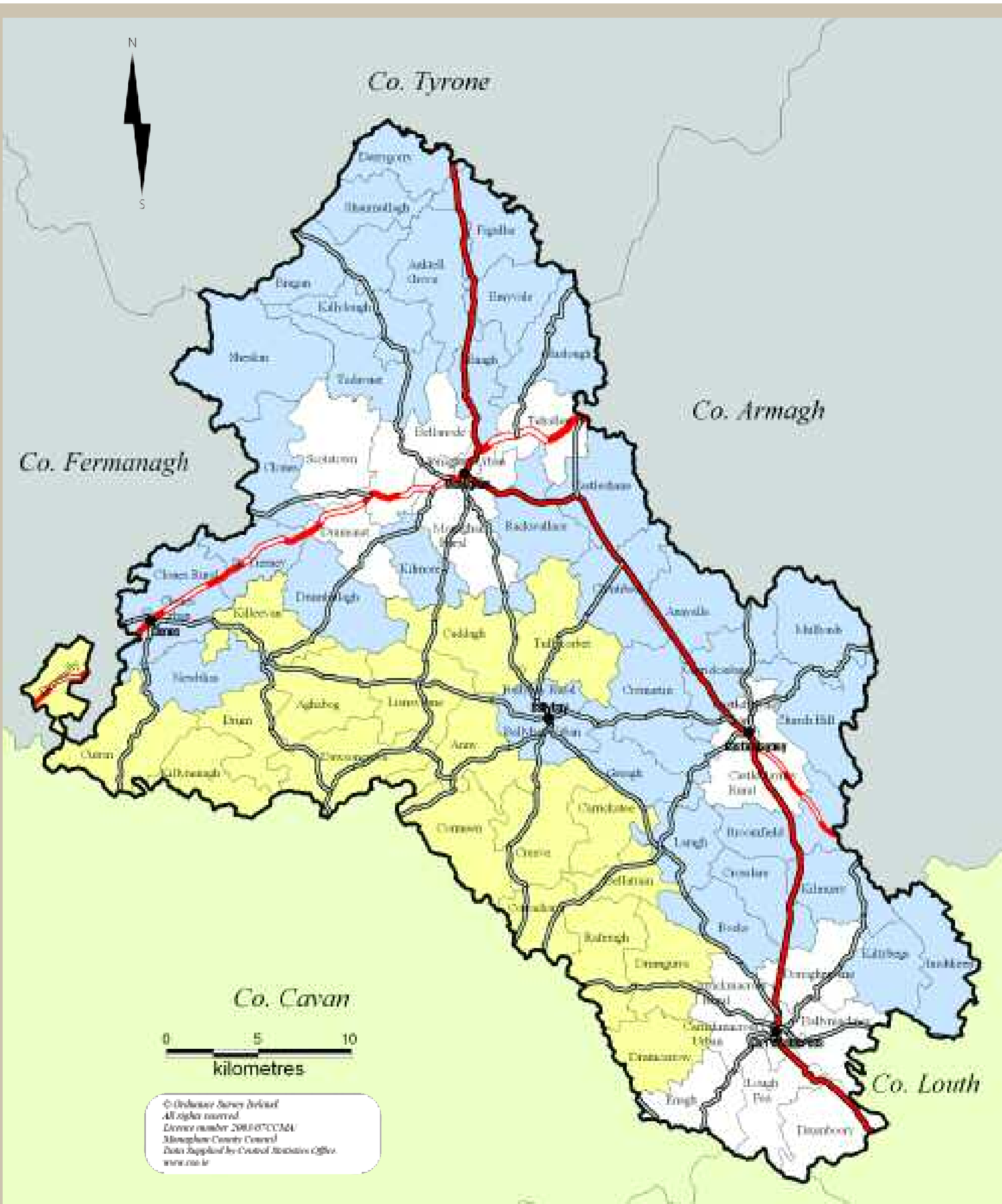
The Clár Programme & other Rural Revitalisation Initiatives

5.1.2 The Clár Programme

In October 2001, the Department of Community, Rural and Gaeltacht Affairs, launched the Clár (Ceantair Laga Ard-Riachtanais) Programme. Clár is a targeted investment programme in rural areas, aimed at revitalising these areas. It is designed to tackle the problems of deprivation, decline and lack of services in rural areas and it provides rural communities with funding for infrastructure, and social and community infrastructure. The areas originally selected for inclusion in the Clár programme were those which suffered the greatest population decline from 1926-1996, with an average population loss of 50 %. These areas included in the original Clar area are outlined in yellow on map 5.1.

Following an analysis of the 2002 Population Census data, the Clar areas throughout the country were reviewed and extended arising from the commitment in the agreed Programme for Government. The additional areas now included in County Monaghan are outlined in blue on map 5.1. The remaining DEDs in white on map 5.1 are the areas outside the Clar Programme in the county.

[24] County Monaghan Baseline Data Report 2002 – prepared by GAMMA



CLAR Area
Map 5.1

Pre 2006 Clár area
Extended Clár area 2006
Main Towns
National Primary Route
National Secondary Route
Regional Roads

DEDs of County Monaghan in Clar Area

Pre 2006 Clár Area	Extended Clár Area 2006	
Aghabog	Anketell Grove	Enagh
Anny	Annayalla	Figullar
Bellatrain	Ballybay Rural	Glaslough
Caddagh	Ballybay Urban	Greagh
Cormeen	Bocks	Inniskeen
Carrickatee	Bragan	Killylough
Corracharra	Broomfield	Kilmore
Creeve	Carrickaslane	Kilmurry
Currin	Castleshane	Kiltybegs
Dawsongrove	Church Hill	Laragh
Drumcarrow	Clones	Mullyash
Drumgurra	Clones Rural Pt.	Newbliss
Drum	Clones Urban	Rockwallace
Drumully	Clontibret	Shanamullagh
Killeevan	Cremartin	Sheskin
Killynenagh	Crossalare	St Tierney
Lisnaveane	Derrygorry	Tydavnet
Raferagh	Drumhillagh	
Tullycorbet	Emyvale	

5.1.3 PEACE II Programme

The PEACE II Programme is a European Union Structural Funds Programme aimed at reinforcing progress towards a peaceful and stable society and to promote reconciliation in the border counties. The areas eligible for funding are all of Northern Ireland and the border counties of Cavan, Monaghan, Leitrim, Sligo, Donegal and Louth. It offers funding for projects that make the most of opportunities for community and economic development arising from peace, and includes initiatives such as economic renewal, cross border co-operation and locally-based regeneration and development strategies.

Agriculture

5.2 Agriculture

In contrast to other areas of the Irish economy, the national output of agriculture has not changed greatly in recent years. The estimated numbers of livestock have shown relatively minor variations in the past five years. While the number of sheep has decreased, the numbers of cattle, pigs and poultry have increased. Irish agriculture remains dominated by grass-based rearing of cattle and sheep with almost 91% of the agricultural area devoted to grass, silage, hay and rough grazing[25].

However while agriculture continues to be the principle land use, a continuous decline in the numbers employed in the agriculture sector is evident. Within the BMW Region during the period 1999 and 2003 the numbers of those employed within the agriculture sector fell by 11,400 (a decrease of 19.4 %)[26].

5.2.1 Common Agricultural Policy (CAP) Reform

Direct payments to Irish farmers form a very significant proportion of Irish farmers' income. While such payments are very beneficial to farmers they can lead to unforeseen side-effects that can have environmental consequences. Agenda 2000 reforms proposed that cross-compliance with

[25] Department of Agriculture and Food, 2003

[26] Audit of Innovation in the BMW Region, 2004

environmental conditions compatible with sustainable agriculture should be matched to such payments by Member States. In 2003, EU farm ministers adopted a fundamental reform of the CAP with a tight budgetary ceiling for the EU-25 until 2013. The financial discipline mechanism is geared towards consumers and taxpayers, while giving EU farmers the freedom to produce what the market wants. In future, the vast majority of subsidies will be paid independently from the volume of production. Member States may choose to maintain a limited link between subsidy and production. These new "single farm payments" will be linked to environmental, food safety and animal welfare standards. Severing the link between subsidies and production will make EU farmers more competitive and market orientated, while providing the necessary income stability. More money will be available to farmers for environmental, quality or animal welfare programmes by reducing direct payments for bigger farms. It was further decided to revise the milk, rice, cereals, durum wheat, dried fodder and nut sectors. The different elements of the reform entered into force in 2004 and 2005.

5.2.2 Census of Agriculture 2002

The Census of Agriculture, 2002, found that there was a 17% fall in the number of active farms between 1991 and 2000, with the number of family and regular non-family workers engaged in farming also falling by 17.5%.

The average size of farm was found to have increased from 26.0 hectares in 1991 to 31.4 hectares in 2000. There was an increase in the number of dairy cows, other cows and herd size, with a 15% decrease in the number of sheep over the same period. Specialist beef production was the most common type of farming and the next most important was mixed grazing livestock.

5.2.3 Teagasc National Farm Survey

The annual Teagasc National Farm Survey (NFS) which determines the financial situation on Irish farms by measuring the level of gross output, costs, income, investment and indebtedness across the spectrum of farming systems and sizes[27] found that;

i. On 50% of all farms, either the farmer or their spouse has an off-farm job. The highest incidence of off-farm employment occurs in dry-stock systems where extensive beef and sheep production yields low profit margins.

ii. On 74% of farms, either the farmer or their spouse has some form of off-farm income, through employment, social assistance or pension.

The survey also showed that there are two distinct agricultural groups in Ireland:

i. Small part-time farmers engaged in beef and sheep production, yielding low profit margins and highly dependent on direct payments and off-farm employment.

ii. More dynamic full-time farms, which represent the commercial or viable sector of Irish agriculture and are mainly involved in dairy and tillage farming[28].

5.2.4 Agriculture in County Monaghan

County Monaghan traditionally had a very strong agricultural base and primary and secondary agriculture still has an important role to play in the county's economy. While agriculture continues to provide both direct and indirect employment, it has reflected the national trend of a decline in employment numbers. As indicated in section 5.1 the services sector has now become the largest employer in the county.

In recent years falling incomes has put pressure on farmers to sell development sites to supplement a declining income. It must be recognised that such development can be in conflict with the need to protect the character of the countryside and the viability of urban areas. This trend is typical of most counties throughout the country and as a result there are implications for land use planning.

Some of the findings from the Census of Agriculture 2002 relating to County Monaghan are included in Table 5.4 below.

[27] Since 1995 very small farms (under 2 European Size Units) are excluded from the survey

[28] Source: Farmers Journal 07 August 2004, page 7

Table 5.4: Number of farms classified by type of farm in County Monaghan and Ireland

Farm Type	Monaghan		Ireland	
	Number	%[29]	Number	%
Specialist Tillage	20	0.5	4,736	3.34
Specialist Dairying	1,093	24.0	26,292	18.57
Specialist beef production	2,731	60.0	72,141	50.97
Specialist sheep	77	0.6	12,233	8.64
Mixed grazing livestock	402	9.0	20,729	14.64
Mixed crops and livestock	29	0.7	3,644	2.54
Other	215	5.0	1,752	1.23
Total	4,567	-	141,527	-

Source: Census of Agriculture 2002,

The most popular type of farming in Monaghan is beef production which represents 60% of the farms compared to a national average of 50.97%. One other dominant farm type is that of dairying with 24% of farms in this sector compared to an average of 18.57%. 5.0% of farms in Monaghan are in other farm types which can be accounted for by pigs, poultry and mushroom farming.

Policies on Agriculture

AG 1.	Encourage the continued use of agricultural farm holdings and buildings.
AG 2.	Protect high quality agricultural land within the county
AG 3.	Give favourable consideration to agricultural development which is appropriate in terms of scale, location and nature.
AG 4.	To facilitate the process of farm diversification and intensification by giving favourable consideration to appropriate new and existing, rural based farm enterprises.
AG 5.	Realise the potential of tourism and agri-tourism as a means of contributing to farm diversification.
AG 6.	Facilitate, where appropriate, specialist farming practices, e.g. Poultry, mushroom growing, stud farms etc.
AG 7.	Protect soil, groundwater, wildlife habitats, conservation areas, rural amenities and scenic views from adverse environmental impacts as a result of all agricultural practices.

[29] Percentages have been rounded off

Policies on Agriculture (Cont.)	
AG 8.	Address the infrastructural deficit so as to serve the needs of agriculture, in co-operation with the appropriate agencies.
AG 9.	Support farm-based tourism such as on-farm visitor accommodation and supplementary activities including health farms, heritage and natural trails and pony trekking.

Forestry

5.3 Forestry in Ireland

Forestry is an important renewable resource with a major role to play in sustainable rural development. Presently Ireland has the lowest proportion of land devoted to forestry of all the EU nations where the average is 30%[30]. Monaghan County has in turn one of the lowest proportions of land devoted to forestry nationally.

The national target as set out in the government document "Growing for the Future: A Strategic Plan for the Development of the Forestry Sector in Ireland 1996" is to have a forestry cover of 17% by 2030. The overall aim of the strategy is "to develop forestry to a scale and in a manner which maximises its contribution to national economic and social well-being on a sustainable basis which is compatible with the protection of the environment". The resultant increase in the productive planted area nationally to 1.2 million hectares has the potential to radically alter the landscape

5.3.1 Forestry in Monaghan

Monaghan County Council recognises the importance of forestry development, as set out in government policy and acknowledges the potential for further afforestation in County Monaghan. It recognises that forestry can have both positive and negative environmental effects and that it can greatly impact on the landscape, wildlife and bio diversity.

While initial afforestation is normally considered exempted development, forestry which would impinge on the character of the landscape, or a view or prospect of special amenity value or special interest, the preservation of which is an objective of the development plan, is not considered exempt, and will require planning permission.

The Forest Service is currently drawing up 'The Indicative Strategy for County Monaghan'. This document will inform decisions and highlight potential locations for future forestry in the county.

Policies on Forestry	
FOR 1.	Facilitate afforestation in appropriate locations, in co-operation with the Forest Service and Coillte and in accordance with the principles of Sustainable Forest Management and code of best practice.
FOR 2.	Resist afforestation which would detrimentally impact on landscapes of importance or where it would otherwise be detrimental to matters of acknowledged public importance.
FOR 3.	Realise the potential of forestry on rural economies through the promotion of appropriate related industries and rural tourism.
FOR 4.	Protect natural waters, wildlife habitats, conservation areas, heritage areas, archaeological sites and artefacts within forest sites and nature designations from pollution or injury.
FOR 5.	Promote mixed species forestry and selective rather than clear felling
FOR 6.	Resist excessive afforestation that would negatively impact on rural communities

[30] Rural Environmental Indicators, EPA, 2001

Energy & Renewable Resources

5.4 Energy Provision

The development of secure and reliable energy infrastructure is recognised as a key factor for maintaining and promoting growth together with attracting investment to the County.

The National Spatial Strategy has identified reliable and effective energy systems such as gas and electricity to power industry and services as key prerequisites for effective regional development. Prime considerations relevant to the Border Region are the development of energy infrastructure on an all-island basis and the strengthening of energy networks in the West, North West, Border and North Eastern areas in particular.

It is a stated objective of the Border Regional Planning Guidelines (RPGs) to highlight energy deficits within the Region, to initiate the establishment of strategic infrastructures throughout the Region through co-operative action by the member planning authorities and to encourage research and development of alternative forms of energy with regional potential. The Local Authority supports this initiative.

The provision of energy supply, with a variety of supply sources is viewed as essential in achieving growth within a region. When preparing plans for a region it is important to liaise with the main energy providers in the region. The main player is the ESB, with Bord Gáis and other renewable energy sources, including wind energy, increasing their share of the market.

5.4.1 Energy Provision in County Monaghan

In Monaghan the primary source of energy is electricity, with the supply of natural gas to the county increasing. The ESB continues to improve its network of supply around the country. While Monaghan is linked into the main Irish electrical supply system, there are no generation sources within the county.

The ESB is also important in the facilitation of wind power, providing support for independent wind energy suppliers, purchasing the power in all of the Alternative Energy Requirement (AER) under long term contracts.

Bord Gáis has a gas main extending from Drumquill to Carrickmacross and Lakeland Dairies in Lough Egish. Bord Gáis has also laid distribution mains in Carrickmacross for domestic supply, as well as connecting services to all large industrial commercial customers in the town. In general however the county is poorly supplied in this area with a weak gas infrastructure. Bord Gáis had been examining the extension of its natural gas network to Castleblayney and also the extension of the transmission network to a central point in County Cavan, adjacent to Cootehill, which would allow distribution mains to be laid in Cavan, Clones and Monaghan. However, following recent studies, these projects are currently deemed not to be economically viable, although they will be subject to review at two-yearly intervals. The lack of available gas supply impinges upon the activities of the County's SME sectors, particularly those involved in food production.

5.4.2 Wind Energy

The Green Paper on sustainable energy advocates a doubling of national renewable energy output by 2010. The principal renewable resource accessible to technology at the present is wind energy. County Monaghan has, in terms of alternative energy a substantial potential for the development of wind. A wind farm of 5 turbines has recently been constructed at Mullananalt, Ballybay, while a further planning application at Tullynageer, Castleblayney has recently been approved. Two other proposed wind farm developments at Carricknabrock and Eshnaheeda (a cross-border application with additional turbines proposed in Co. Tyrone) are the subject of current planning applications.

The Planning Authority will support the exploitation and development of wind energy sources where they are environmentally acceptable. In doing so the Planning Authority will have regard to the '*Wind Energy Guidelines 2006*', issued by the Department of the Environment, Heritage and Local Government.

Policies on Energy and Renewable Resources

REN 1.	Promote and encourage the use of renewable energy sources in appropriate locations, where this can be done in an environmentally sensitive manner
REN 2.	Facilitate wind farm development having regard to relevant legislation and guidance from the DoEHLG..
REN 3.	Promote a 'plan-led' approach to identify areas where there is significant wind energy potential.
REN 4.	Encourage efforts to reduce energy usage across all sectors.
REN 5.	Promote extension of gas network throughout the County.
REN 6.	Promote energy efficient buildings, using materials sourced from renewable resources
REN 7.	Promote the growth and use of renewable energy sources from vegetation.
REN 8.	Provision for alternative fuels is a requirement in all new service stations/petrol forecourts in County Monaghan

Industry

5.5 Industry in the Border Region

Industry includes the manufacturing and distribution sectors of the economy. In 2002, there were 2,694 manufacturing and service establishments in the BMW Region. The Border Region has 1,167 establishments and the highest level of manufacturing plants.

The most important industries in the Border Region are in the areas of food processing, metal products and other manufacturing. Mineral products, electrical and optical equipment, together with wood and wood products are important to a lesser extent.

Table 5.5: Manufacturing and Services Industry

Sector	Border		
	Total	MNEs[31]	Irish
Food Products beverages and tobacco	175	10	165
Textiles and textile products	56	3	53
Clothing, footwear and leather	38	2	36
Wood and wood products	61	2	59
Pulp paper and paper products; publishing and printing	42	1	41
Chemicals, chemical products and man-made fibres	34	10	24
Rubber and plastic products	40	14	26
Other non-metallic mineral products	76	1	75
Basic and fabricated metal products	112	8	104
Machinery and equipment	48	4	44
Electrical and optical equipment	66	24	42
Transport equipment	27	8	19
Other manufacturing	134	2	132
Sub Total Manufacturing Plants	909	89	820
Financial Services	-	-	-
International Services	100	9	91
Other	158	4	154
Sub Total Services	258	13	5
Total	1,167	102	1,065

Source: Forfás Database 2003

5.5.1 Industry in County Monaghan

County Monaghan's industries employ 19.3% of the working population representing a proportionately higher percentage than the BMW Regional figure or the national average. Details of large companies are outlined in Table 5.7 below.

[31] Multi National Enterprises

Table 5.6: Number and type of Large Companies in Ireland, BMW Region and County Monaghan.

Company	Ireland	BMW	County Monaghan
Large Companies	-	75	11
Pharmaceutical & Chemical	81	9	1
ICT	111	10	0
Medical Device	74	34	1
Biotechnology	39	10	0

Source: Final Report to the BMW Regional Assembly- Audit Innovation in the BMW Region 2004 p.31-41 (based on Irish Times Top 1000 companies 2003)

Table 5.7: Details of Large Company Type and Name in County Monaghan

Company Type	Number	Name
Food Processing	10	Grove Farms Silver Hill Foods Monaghan Mushrooms Town of Monaghan Co-op Rangeland Foods Rye Valley Foods Lakeland Dairies AIPB Clones Abbott Ireland Feldhues
Mechanical Engineering	1	Kingspan Century Homes
Electrical Engineering	1	Bose Corporation
Manufacture of Motor Parts & Vehicles	1	Combi Lift
Metal Production	1	Kingspan
Man-made Fibres Industry	1	Gernord
Pharmaceutical & Chemical	1	Norbrook Labs

Source: Final Report to the BMW Regional Assembly- Audit Innovation in the BMW Region 2004 p.31-41 (based on Irish Times Top 1000 companies 2003)

According to the Economic and Social Research Institute's Medium Term review 2003-2010, the move up the value-added chain' may see a movement away from labour-intensive manufacturing industry to the skilled service sector of the economy. According to the Census of Production 2002, Local Industrial Units will remain important to the number of workers employed and to the local economy of County Monaghan.

Table 5.8: Industrial Local Units, 2002- Details of Activity in County Monaghan

Description of Variable	County Monaghan	BMW Region
No. of Local Industrial Units	134	740
Total industrial workers	3,608	22,013
Total other employees	1,023	7,160
Proprietors and unpaid family workers	86	313
Outside piece-workers	23	1,430

Source: Census of Industrial Production 2002.

The Industrial Developments Authority (IDAs) current strategy is to increase competitiveness by encouraging MNEs to move up the value chain, to pursue appropriate high quality new Foreign Direct Investment in selected sectors, to encourage infrastructural developments to expand the number of alternative locations and to promote developments in the wider economy that enhance the business environment.

Table 5.9: Tenants of IDA Business Parks in County Monaghan- Killycard Industrial Estate, Castleblayney

Company Name	Activity/Product
M.C. Building Chemicals	Silicone Sealants
Shabra Polymex Ltd.	Recycle plastic bags
Shelter Insulations (Kingspan Group)	Insulated panels

Source: www.idaireland.com

The FÁS aim is to increase the employability, skills and mobility of job seekers and employees to meet labour market needs, thereby promoting competitiveness and social inclusion. To achieve this FÁS provides a range of training and employment programmes, aimed at employers, employees and unemployed people.

Table 5.10: Number and location of FÁS Enterprises

	Border Region	County Monaghan	Total Ireland
No. of Enterprises	33	4	235

However, the changing role of the local manufacturing sector will require a gradual change in industrial policy towards the promotion of skills and processes that marry skilled labour with profitable employment. This has major policy implications for industrial development, training, infrastructural provision and research and development.

Policies on Industry

IND 1.	Ensure that sufficient and suitable land is reserved for new enterprise development at key locations throughout the county
IND 2.	Promote new industrial development in other centres with existing infrastructural facilities, services, good communications, or where they can be provided at a reasonable cost..
IND 3.	Encourage the growth and/or expansion of existing locally based small scale industry through the provision of suitably serviced sites..
IND 4.	Co-operate with IDA Ireland, Enterprise Ireland, Forbairt, Forf-s, the County Enterprise Board, community groups and other relevant bodies to ensure a co-ordinated approach to the provision of necessary infrastructure and services to support industrial development.
IND 5.	Ensure that a high standard of design, layout and amenity is provided and maintained in all new industrial developments.
IND 6.	Support an expanded education and research sector in County Monaghan.
IND 7.	Continue to support and facilitate cross-border co-operation and trade between County Monaghan and Northern Ireland..
IND 8.	Ensure that suitably serviced sites are accommodated in appropriate locations
IND 9	Facilitate the expansion and development of existing rural based industrial and manufacturing businesses subject to relevant development management guidelines. Such development should not unduly impact on the residential amenity of existing properties
IND10	Promote the protection and conservation of the existing environment in industrial areas

5.5.2 Extractive Industry

County Monaghan contains reserves of mineral materials including stone, sand, gravel and peat which are worked at many locations across the County. The Council recognises the importance of quarrying and other extractive industries to the economic life of the county. However, the Planning Authority faces a challenge in facilitating the exploitation of the materials while minimising the impact on the environment. The Planning Authority will have regard to the 'Quarries and Ancillary Activities- Guidelines for Planning Authorities April 2004' issued by the Department of the Environment, Heritage and Local Government, in considering proposals for the quarrying industry.

Policies for Extractive Industry	
EI 1.	Identify the location of all major mineral deposits in the county (with the assistance of the Geological Survey of Ireland) and safeguard these resources for future extraction.
EI 2.	Promote development involving the extraction of mineral reserves and their associated processes, where the Planning Authority are satisfied that they will be carried out in a sustainable manner without adversely impacting on the environment or on other land uses in the County.
EI 3.	Restrict other development in the neighbourhood of existing extractive sites or sites which have significant resource potential, where such developments would limit the future exploitation of natural resources.
EI 4.	Restrict development which would detrimentally impact on the natural or built environment or would otherwise be detrimental to matters of acknowledged public importance.
EI 5.	Restrict extraction in close proximity to existing developments where potential sources of nuisance are considered to be incompatible.
EI 6.	Ensure that land is reinstated and landscaped on a phased basis following the termination of extractive activities.

Retailing in County Monaghan

5.6 Retailing

The Irish retail sector has experienced unprecedented structural changes in the last thirty years. This reflects structural changes, which have taken place within the sector at international level. The Irish National Policy and Advisory Board for Enterprise, Trade, Science and Technology (Forfas 2000) identified four key trends within the international retail sector that are now affecting Ireland. They are as follows:

i. A growing trend towards larger sized stores and larger retail groups

ii. Diversification by retailers into new product areas, new geographic markets (nationally and internationally) and new business sectors e.g. food retailers selling non-food goods

iii. Rapid developments in customer services such as home shopping and deliveries, longer opening hours and loyalty card schemes

iv. Improvements in supply chain management including centralised distribution centres (CDCs) and increased investment in Information Technology (IT)

It is with these changes in mind that the new Retail Planning Guidelines were published in January 2005. The five main policy objectives of these guidelines are as follows:

i. To ensure that in future all development plans incorporate clear policies and proposals for retail development

ii. To facilitate a competitive and healthy environment for the retail industry of the future

iii. Promote forms of development which are easily accessible - particularly by public transport - in a location which encourages multi purpose shopping, business and leisure trips on the same journey

iv. To support the continuing role of the town and district centres

v. A presumption against large retail centres located adjacent or close to existing new or planned national roads/motorways.

5.6.1 Retail Strategy for County Monaghan

All Planning Authorities are required to incorporate clear policies and proposals for retailing into their Development Plans and must have regard to the 'Retail Planning Guidelines for Planning Authorities, January 2005 issued by the Department of the the Environment, Heritage and Local Government.

Monaghan County Council adopted a 'Retail Development Strategy for County Monaghan' in October 2003. The aim of which was:

'to strengthen and consolidate the existing retail hierarchy of County Monaghan; to provide adequate retail facilities to service the current and project population; and to ensure that new retail development located within the county is of an appropriate size, equitable, efficient and sustainable in the long term'.

In the Retail Strategy an analysis of the constraints and opportunities in the County was carried out. These can be summarised as follows:

Table 5.11: Strengths and Weaknesses of retailing in Monaghan

Strengths	Weaknesses
Expanding the County Town - Monaghan	Declining smaller towns
Expanding rural areas	Limited existing level of provision of retail services and operators within the County
Significant tourist population	Limited bulky comparison floor space
Close proximity to Northern Ireland, particularly Counties Armagh and Fermanagh	Competition from retail centres located outside the County such as Armagh, Dundalk and Enniskillen Exchange rate with sterling

Protecting the overall vitality and viability of town centres is both a national objective and a local objective within this plan. In County Monaghan the focus is on two areas - improving the retail provision in Monaghan Town and to a lesser extent Carrickmacross and as appropriate, in smaller towns and villages of the county (in accordance with the retail hierarchy (Table 5.12)

Table 5.12 Retail Hierarchy of County Monaghan

Level 1 County Retail Centre	Monaghan Town (National 3rd Tier Town)
Level 2 Sub County Retail Centres	Major-Carrickmacross Minor- Castleblayney
Level 3 Local Retail Centres	Ballybay and Clones
Level 4 Remaining Rural Areas including Rural Villages and Small Scale Settlements	Examples include: Emyvale, Smithborough, Clontibret

Source: Retail Development Strategy for County Monaghan 2003

Dunnes Stores, Monaghan town

The retail policies on the following page are to be considered in conjunction with the Retail Development Strategy for the County and will be used in controlling and guiding future retailing within the County.

Policies for Retail Development

RET 1.	To strengthen and protect the existing retail hierarchy of towns and villages within County Monaghan and to support the multi-purpose role of town centres as social, commercial and cultural attractions.
RET 2.	To maintain and consolidate existing retail cores by strictly enforcing the 'sequential approach' test to proposed retail development.
RET 3.	To ensure that the location of new retail developments within the County, including super markets, petrol filling stations and fuel depots, is appropriate and sustainable.
RET 4.	To ensure scale and type of retail provision is appropriate for different levels of the retail hierarchy.
RET 5.	To adopt a suitable floor space restriction or cap for new supermarket developments with in the County.
RET 6.	To adopt a suitable floor space restriction or cap for new petrol filling station or fuel depot developments within the County.
RET 7.	To adopt a suitable minimum floor space restriction and maximum floor space cap for new retail park and retail warehouse developments within the County.
RET 8.	Reduce Expenditure Leakage from the County
RET 9.	To improve accessibility to, and from, existing centres
RET 10.	To promote excellence in urban design including a general upgrade in the built environ ment and shop facades.
RET 11.	To require retail development proposals within towns and villages to make a positive contribution to the general townscape.
RET 12.	To improve the variety, range and quality of retail outlets within town and village centres.
RET 13.	To encourage alternative uses for vacant or derelict buildings.
RET 14.	Establish effective management and promotion of the county towns.
RET 15.	Review the County Retail Development Strategy for County Monaghan during the plan period 2007 - 2013

Sustainable Tourism

5.7 Sustainable Tourism in County Monaghan

County Monaghan possesses extensive natural resources and an environment of considerable scenic value. This, combined with its attractive towns and cultural heritage, provides a major opportunity for the development of tourism.

The number of visitors to Ireland continues to rise with over 6.7 million tourists visiting the country in 2005 of which 489.000 overseas visitors visited the North West Region providing €189.9m of revenue. Of these, 42.000 overseas visitors came to Co. Monaghan. There were also 650,000 domestic visitors to the region, providing €95.4m revenue. Co. Monaghan's share of the overseas visitors to the region has dropped from 8.8% in 2004 to 8.6% in 2005, while revenue has increased from €17m in 2004 to €20m in 2005.[32]

Co. Monaghan has a wide range of recreational activities to offer visitors including: golfing, swimming, sailing, fishing, cycling, walking, rally-driving, quad-biking, equestrian activities and clay-pigeon shooting. In addition there are many attractions such as the birthplace of Patrick Kavanagh at Inniskeen; high quality lace-making centred on Carrickmacross; the wildlife centre near Clontibret and historic houses with accommodation at Castle Leslie and Hilton Park.

However, despite the many attractions that the county has to offer and the excellent and proximate transport connections, the number of visitors remains extremely low. In fact Co. Monaghan has the second lowest number of visitors in the North West Region with only Co. Leitrim receiving less. In addition revenue from these visitors is also low, in comparison to other counties. Given future trends in European and Irish agriculture the development of alternative rural economies is essential and tourism should be seen as an attractive and sustainable form of income.

Thus tourism in the county is undeniably an underdeveloped resource. However the county has seen recent investment in recreational facilities with the Monaghan Leisure Centre due to opened in 2006; new way-marked trails; new signage, angling infrastructure; parks and amenity area enhancement; an upgrading of the County Museum and increased investment by the private sector in the standard and range of accommodation.

Co. Monaghan now needs to avail of cross-marketing opportunities provided by the peace process; take advantage of the growing trend amongst urban dwellers for walking and water based rural activities; and ensure that the natural resources upon which these and other activities are based, are protected from inappropriate development.

Many opportunities lie ahead for the county. It is imperative that, to capitalise on these opportunities, the organisations that manage tourism work together with the common aim of sustainable tourism development.

Policies for Tourism

TOU 1	Continue to fund and support agencies involved in tourism development, such as Monaghan Tourism
TOU 2	Encourage and support increased coordination, cohesion and linkages between agencies such as Monaghan Tourism and North West Tourism (Failte Ireland).
TOU 3	Support the implementation of the County Tourism Marketing Plan 2005-2007; and support cross-border marketing opportunities with the aim of increasing visitor numbers; spend per visitor; and reducing issues of seasonality.
TOU 4	Investigate funding opportunities for the development of flagship tourism products; such as the Ulster Canal, Way-marked trails; inter-county cycle routes and the Lough Muckno recreation facility. Focus medium term funding and marketing on at least one such flagship product.
TOU 5	Drive the production of a 5–year action-led Tourism Development Plan for the county, led by Monaghan Tourism and based upon the County Enterprise Board Strategy's tourism component.
TOU 6	Encourage clustering of products to increase linkages within and reduce leakage from, the local economy. e.g. linkages between providers of accommodation and local farmers/niche food producers.

[32] Failte Ireland 2005 Preliminary Figures

Policies for Tourism (Cont.)

TOU 7	Promote the establishment of a Tourism Grants Committee to drive applications for Operational Funding tourism grants under the National Development Plan 2007-2013.
TOU 8	Protect the natural resources upon which tourism is based through the enforcement of policies in relation to resource protection (ENV8-25); Landscape Character Assessment (ENV1); Architectural Conservation Areas (ENV31); water quality (WM7-10 and ENV39-46); biodiversity (ENV22-24); rural housing (SP6, RH8/9, RD1-6) and holiday home development.
TOU 9	Capitalise on the natural resources of the area through the promotion of Co. Monaghan as a centre of excellence for angling.
TOU 10	Encourage the improvement of access, signage and tourist information facilities
TOU 11	Evaluate public transport provision and where appropriate provide support for alternatives to the use of private cars to access visitor attractions (PT1).
TOU 12	Investigate the potential of and opportunities for the funding of walking and cycling trails in the county; and for the development of linkages between existing trails such as the Kingfisher Trail and others in adjoining counties, including cross border partnerships. (REC3)
TOU 13	Investigate and support best-practice environmental management including energy efficiency, waste management, procurement and recycling in accommodation providers and tourism enterprises in the County, through the use of accreditation and eco-labeling.
TOU 14	Support agri-tourism in the form of on-farm visitor accommodation and supplementary activities such as health farms, heritage and nature trails, pony trekking and boating; ensuring that all built elements are appropriately designed and satisfactorily assimilated into the landscape (AG5).
TOU 15	Facilitate infrastructure for marine related activities such as boating, angling, and canal cruising.
TOU 16	Promote County Monaghan and its angling centres, robustly and innovatively as 'catch and release' fisheries. Attention is drawn to the lakes, Lough Muckno, Lough Major, the Dromore River System, Lough Na Glack, Lisanisk Lake, Peters Lake and Rossmore Forest Park Lakes
TOU 17	Give favorable consideration to proposals for hotels, guesthouses and short term let self catering accommodation in defined settlements and in appropriate rural locations[33] where the development would meet a clearly identified site specific tourism need.
TOU 18	Where permission has been granted for short term let self catering accommodation in the rural area outside the defined limits of a settlement, the nature, design and layout of the development should be reflective of their tourism use. In all cases the Planning Authority shall require the applicant / developer to enter into a legal agreement prohibiting the use of the accommodation as permanent places of residence. Conversion of the accommodation to permanent places of residence will be prohibited.
TOU 19	Promote and give favorable consideration to the sensitive redevelopment of derelict and vacant properties for tourism use.

[33] The applicant shall be required to satisfy the Planning Authority that the location of the development is essential to the nature and purpose of the proposed development