

Chapter 5

Economic Activity

5.1 Introduction

The county's economic base is narrow and is particularly dependant on the manufacturing, agriculture and food sectors. Many of these businesses are confined to low skilled manual workers. Much of the production is based upon high volume and low margins and this is reflected by the fact that the county's gross output per person is ~~approximately one third~~ is less than half of the national average. Although there are major international agencies operating throughout the country, to date, inward investment levels in County Monaghan have been low.

In its favour however, Monaghan has a particularly entrepreneurial population with a tradition of self employment and a high level of new business start ups. This is a very important asset which should be encouraged.

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'.

The White Paper was followed by the introduction of The Rural Development Programme 2007-2013 (RDP). The programme is structured around three core axes which have the aims of (a) improving the competitiveness of agriculture, (b) improving the environment and (c) improving the quality of life in rural areas. Within these three axes there are individual measures, which contribute to the overall aim of the axis. A fourth Axis defines the LEADER approach towards achieving the objectives of the RDP.

*"Income generated by exports will be the key driver of sustainable growth for Ireland in the future. It will provide the stimulus for growth across all sectors, boosting secondary employment in the domestic market, stimulating consumer confidence and providing increased opportunities for locally traded businesses. This export-led growth will be based on innovation, productivity, cost competitiveness and a strong enterprise mix."*²

It is therefore an aim of this plan to provide a healthy and vibrant level of economic activity in the county. Despite Monaghan's strategic location and the large number of international agencies operating throughout the country, the county is not maximising its competitive advantages. It is vital that the 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

5.2 Employment Structure

The economic conditions of Ireland have dramatically changed in the last three years, with unemployment at its highest in decades. At present the number of persons in the State on the live register stands at approximately 432,000 (14%). In County Monaghan the number of persons on the live register increased from 2,093 in January 2007 to 6,337 in January November 2012, an increase of 208%. However, recent figures released by the Central Statistics Office in October 2011 showed a slight annual decrease in the National Live Register figure since April 2007.

The Economic and Statistical Research Institute/FAS employment forecasts to 2015 indicate that the shift towards services is set to continue, so that by 2015 approximately 80% of the workforce will be employed in the service sector (60% excluding public sector). This should not be interpreted to mean that Ireland is no longer 'in manufacturing.' Ireland has strong manufacturing competencies and high value added, productive intensive manufacturing based on Research, Development and Innovation will continue to contribute significantly to Ireland's exports and growth.

At a sectoral level the ESRI/FAS forecast indicates that by 2015:

- Employment in a range of service activities, including communications, business, finance, insurance and other market services is forecast to surpass pre-recession levels, as is employment in high-technology manufacturing and transport;
- More mature sectors including tourism and hospitality (hotels/restaurants), retail and distribution, food manufacturing and construction are likely to resume growth but are unlikely to be fully restored to pre-recession levels;
- Employment in health, education and public administration and defence provide a significant contribution to employment and are likely to remain unchanged (including public and private sector); and
- Sectors which are likely to continue decline in employment terms include agriculture and low value added manufacturing.

5.2.1 Employment 2011

Table 5.1: Persons aged 15 years and over classified by principal economic status

	Monaghan		National	
	Persons	%	Persons	%
Pop. aged 15+	46,993	-	3,608,662	-
Employed	23,005	49.0	1,807,360	50.1
Looking for first regular job	471	1.0	34,166	1.0
Unemployed	5,511	11.7	390,677	10.8
Student	5,076	10.8	408,838	11.3
Home Duties	4,569	9.7	339,918	9.4
Retired	5,973	12.7	457,394	12.7
Unable to work	2,192	4.7	156,993	4.4
Other	196	0.4	13,316	0.4

Source: Figures extracted from CSO Census 2011

In County Monaghan in 2011, of the 46,993 persons aged 15 years and over, 49% were at work. This figure was slightly lower than that of the national average of 50.1%. Unemployment in the county during the same period was 11.7, which was slightly above the national average.

Table 5.2: Population Numbers and Percentages Aged 15+ by Employment Sector, 2011

	Monaghan		National	
	Persons	%	Persons	%
Total Persons	23,005	-	1,807,360	-
Agriculture Forestry & Fishing	2,818	12.3	94,247	5.2
Building & Construction	1,508	6.6	90,357	5.0
Manufacturing & Industry	3,206	13.9	193,080	10.7
Mining & Quarrying	71	0.3	5,674	0.3
Wholesale & Retail	3,612	15.7	265,751	14.7
Electricity, Gas, & Water Supply	248	1.1	13,116	0.7
Hotels & Restaurants	1,053	4.6	103,560	5.7
Transport, Storage & Communications	1,152	5.0	97,569	5.4
Banking & Financial Services	512	2.2	93,151	5.2
Real Estate, Renting & Business Activities	1,308	5.7	184,251	10.2
Public Service & Community Services	6,381	27.8	565,293	31.3
Others	1,121	4.9	101,311	5.6

Source: CSO Census 2011

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. In 2011 12.3% of the working population were directly employed in the agriculture, forestry & fishing sector. This figure was is still higher than the ~~BMW Regional figure of 6.8% and the~~ national average of 5.2% ~~of~~ for the same sector.

The building and construction sector accounted for 6.6% of the working population for County Monaghan in 2011. This figure is approximately half the percentage figure for this sector in 2006. ~~This figure was~~ but is still higher than the ~~BMW Region of 13.2% and the~~ national average of 5% in 2011. The number of people employed in manufacturing and industry (13.9% of the working population) ~~dropped by one third but is still was also~~ higher than the ~~BMW Regional figure of 19.2% and the~~ national average of 10.7%.

The service sector (including commerce, retail, transport, public administration and professional services) was the most important employer in the Monaghan economy, ~~accounting for~~ increasing to 61% of the total working population. This figure was however lower than the ~~BMW Regional figure of 55.1% and the~~ national average of 72.5% for the same sector.

Other employers accounted for 4.9% of the working population. This figure of 4.9% ~~was consistent with BMW Regional figure and is slightly lower than~~ the national average of 5.6% of the same sector.

In the January 2010 edition of its Business Start-up Barometer, Bank of Ireland Business Banking stated that business start ups in Ireland totalled 13,327. This represents a 9% decrease from 2008, which was less than expected. The report states that the Connaught area, which for the purposes of that report included Donegal, Monaghan and Cavan, represented 11% or 1,519 of all business start ups in 2009. The Services sector had the highest level of start ups which amounted to 3,500 or 26%, with the next highest being Finance related with 1176 (8.8%). The report indicates that in Monaghan there were 143 start ups in 2008, 99 in 2009, 21 of which were in the 4th quarter of 2009.

A strong and well functioning innovation system has long been regarded as central to economic success. Interaction between companies and other innovation agencies at the regional level are seen as particularly important in establishing a dynamic process of economic development. Innovative growth also relies on higher education institutions (HEIs) and the generation of new knowledge as well as the so-called Knowledge Intensive Services (KIS) that are delivered in areas such as consultancy and Research and Development (R&D), incubation centres, and access to specialist facilities and expertise. KIS providers can also be found in the private (and public-private) sectors where innovation centres, R&D, Information Communication and Technology (ICT) and Management consultancies are important drivers, providing a conduit for technology transfer in regional economies. These KIS providers are highly innovative companies in their own right, and provide an important measure of the innovative potential of a region.³

While it is extremely difficult to accurately forecast future employment patterns, a number of broad trends are anticipated. Since 2006, the numbers working in construction and construction related manufacturing have declined significantly. It is anticipated that this pattern will continue. It is also 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. It is unlikely that there will be a net gain in manufacturing nationally, but job losses in traditional manufacturing will be offset by gains in high technology areas.

³ Audit of Innovation in the BMW Region 2011

Affluence and Deprivation

5.3 Affluence and Deprivation in County Monaghan

Deprivation is measured on two scales, 'Absolute Deprivation' and 'Relative Deprivation'. Absolute deprivation is a lack of basic necessities relative to a fixed standard such as the amount of food necessary for survival. Relative deprivation is the experience of being deprived of something to which one believes oneself to be entitled to have. The Absolute Deprivation scale ranges from +50 (extremely affluent), to -50 (extremely deprived). On this scale, County Monaghan increased its score from -2.1 in 1991 to +6.7 in 2006. The national score was +10.4.

However, the Relative Deprivation scores are the most important for ensuring resources are targeted towards the most disadvantaged areas. On this scale, the Relative Deprivation score for County Monaghan increased from -2.1 in 1991, to -3.0 in 2006.

In 2006, four of the seventy Electoral Districts (EDs) in the county were classified as "Disadvantaged" (-10 to -19.9) and a further 60% (41) were classified as "Marginally below Average" (0 to -9.9) in comparison to other EDs nationwide.

Table 5.3 below sets out the changes from 2006 to 2011 in respect of Absolute and Relative Deprivation Index scores (Developed by Haase & Pratschke) for County Monaghan, the Border Region, the BMW Region and the State. It is noted that although the relative Index score have remained stable, the Absolute Index Scores have decreased significantly.

Table 5.3: Absolute and Relative Index Scores

	Absolute HP Index Score 2006	Absolute HP Index Score 2011	Change in Absolute HP Index Score 2006-2011	Relative HP Index Score 2006	Relative Index Score 2011	Change in Relative HP Index Score 2006-2011
Monaghan	-3.06	-11.10	-8.04	-3.06	-3.97	-.91
Border	-4.04	-11.00	-6.96	-4.04	-3.99	.05
BMW	-2.50	-9.52	-7.02	-2.50	-2.50	.00
Ireland	-.23	-6.78	-6.55	-.23	.24	.47

** Note: All scores shown in this table are population-weighted aggregates of the small areas level HP index scores.*

Source: The 2011 Pobal HP Deprivation Index for Small Areas (SA) Trutz Haase & Jonathan Pratschke, 2011

Rural Revitalisation Initiatives

5.4 Rural Revitalisation Initiatives

5.4.1 The Clár Programme

The Clár Area within County Monaghan is set out in Map 5.1. As a result of the Government's programme of administrative, funding and departmental re-organisation, the Clár programme is being wound down. Funding has reduced from €24m in 2008 to €0.5m in 2011 to meet outstanding commitments only.

5.4.2 PEACE III Programme

The PEACE III 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.

The first phase (2007-2010) of the Monaghan Peace III programme delivered over nine partnership projects and twenty one small grants across the county of Monaghan. In total thirty projects have been funded under Phase 1, which accounts for €3,221,78.00. The Monaghan County Development Board Peace III Partnership Board has been awarded further funding of €3,678,956 for the implementation of the Monaghan Peace III Phase II Action Plan (2011–2013) by the Special European Union Programmes Body.

The implementation of Phase III will be through a number of delivery mechanisms such as partner delivery, tender, small grants and a resource allocation model. The Resource Allocation Model will be delivered through a local Community organisation. The aim of this model is to provide funding to groups/organisations etc to deliver Peace projects but to remove all administration requirements. All administration and procurement will be undertaken by the designated community organisation delivering the Resource Allocation model. This model will open Peace III funding to those smaller community groups who may not applied in the past and encourage existing small projects to continue to deliver Peace programmes.

5.4.3 INTERREG Programme

INTERREG is an initiative that aims to stimulate cooperation between regions in the European Union. It began in 1989, and is financed under the European Regional Development Fund (ERDF). The current programme is Interreg IV, covering the period 2007–2013. The Programme's two key priorities are co-operation for a more prosperous cross-border region, and co-operation for a sustainable cross-border region. Monaghan Local Authorities have obtained funding for projects such as Castleblayney and South Armagh (CASA) and Clones Erne East Blackwater (CEEB). The CASA project seeks to promote awareness of the CASA region, provide enterprise units in Ballybay, and develop facilities at Lough Muckno and Slieve Gullion. The CEEB project seeks to provide infrastructural development works in rural villages and towns along the Ulster Canal Corridor between Clones and Lough Erne, to provide circular walking/cycling routes and eco-trails on Slieve Beagh and East Fermanagh, to provide basic angling infrastructure in the Erne East area, to develop a training and mentoring programme for twenty businesses, and to develop a cross border integrated marketing programme.

5.4.4 Cross Border Networks

Monaghan County Council is a member of two cross border partnerships, Irish Central Border Area Network and East Border Region. These partnerships provide strategic support to multiple stakeholders on key cross-border regional development issues, which relate to future sustainability, competitiveness, and social cohesion in the cross-border area. They are policy and delivery platforms supporting development throughout the border region and serve as an integrated formal framework to initiate and facilitate new cross border cooperation projects and economic development initiatives.

Objectives for Rural Revitalisation

- RUO 1:** Ensure that all plans and projects relating to rural revitalisation initiatives are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- RUO 2.** Encourage the balanced development of the County.

5.5 Agriculture

Agriculture in Ireland accounts directly for 4.6% of employment and 5.8% of exports. Almost 80% of the 4.2 million hectares of agricultural area within the State is devoted to pasture, hay and grass silage, with 11% in crop production. Albeit from a low level, aggregate farm income increased by 31.5% in 2010 compared to 2009. Cereals and dairy enterprises showed the greatest operating surplus based on improved prices and increased productivity. The livestock sector also showed strong increases in output value. The beef sector increased by 12.2%, pig meat by 7.8% while sheep meat increased by 7.6%.⁴

The agri-food sector remains one of Ireland's most important indigenous manufacturing sectors. Despite the economic difficulties the agri-food sector continues to make a significant contribution to the national economy, generating 6.3% of gross value added and providing 7.4% of employment. It is the primary outlet for the produce and output of family farms and includes approximately 600 food and drinks firms throughout the country that export to some 140 markets worldwide.

Much of the employment in the agri-food sector, both direct and indirect, is dispersed throughout the country making it particularly important to rural areas. The industry accounts for 61% of total manufacturing's consumption of Irish raw materials. In addition the low import dependence and the low level of profit repatriation in the sector means that the net inflow of funds to the Irish economy is much higher than in other sectors.

A major government initiative is the publication of Food Harvest 2020, the strategic roadmap for the agri-food and fishing sector for the next decade. This industry-led report has set growth targets for the various sectors which includes increasing the value of primary output from the sector by 33%, increasing value-added by 40% and increasing exports by 42%.

~~However while~~ Agriculture continues to be the principle land use, and a continuous decline in the numbers employed in the agriculture sector ~~is evident~~ **has recently been reversed**. Within the Border Region during the period 2002 and 2006 the numbers of those employed within the agriculture, forestry and fishing sector fell by 1,476 (a decrease of 9.9%). ~~However during the period 2006 and 2011 the numbers employed in this sector in the State rose from 88,414 to 94,367 and in the Border Region from 13,609 to 14,855.~~⁵

5.5.1 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 environmental conditions compatible with sustainable agriculture should be matched to such payments by Member States.

⁴Department of Agriculture and Food

⁵ Source: Census 2006 and Census 2011

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. The vast majority of subsidies are now paid independently from the volume of production. Member States may choose to maintain a limited link between subsidy and production. These "single farm payments" are 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.

"The CAP Towards 2020: Meeting the Food, Natural Resources and Territorial Challenges of the Future" was published by the European Commission in November 2010. On 12 October 2011 the Commission presented a set of legal proposals designed to make the CAP a more effective policy for a more competitive and sustainable agriculture and vibrant rural areas.

Following the completion of CAP Reform, land use and agriculture will be considered differently. In the future, commonage and other rough grazing will be considered more as an environmental/educational/recreational resource and farmers will be encouraged to regard themselves as custodians of the countryside.

5.5.2 Farm Structure Survey, 2007

The Farm Structure Survey, 2007, found that there was a 25% fall in the number of farms (with at least one hectare of agricultural area used) between 1991 and 2007, and the number of family and regular non-family workers engaged in farming also declined.

The average size of farm was found to have increased from 26.0 hectares in 1991 to 32.3 hectares in 2007. Although there was a decrease in the number of dairy cows, between 1991 and 2007, other cattle numbers increased. There was a 45% decrease in the number of sheep over the same period. In the Border region specialist beef production was the most common type of farming and the next most important was specialist dairying.

5.5.3 Teagasc National Farm Survey 2011

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 sizes⁶ found that;

- Average family farm income averaged €24,461, a 30% increase on the 2010 average
- Dairy and tillage farming provide better incomes than beef or sheep farming
- Direct payments per farm averaged €17,929, comprising 73% of farm income
- On just under half of all farms, either the farmer or their spouse has an off-farm job
- The percentage of farms classified as economically viable businesses increased from 27% in 2010 to 35% in 2011
- Over 34% of farm households are classified as economically vulnerable.

⁶ Since 1995 very small farms (under 2 European Size Units) are excluded from the survey.

- i. ~~The highest incidence of off-farm employment occurs in tillage farming and also dry-stock systems where extensive beef and sheep production yields low profit margins.~~
- ii. ~~On 79% 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, with only 10 % of cattle rearing farms being economically viable~~
- ii. ~~Dairy and tillage farming provide better incomes than beef or sheep farming with incomes increasing by 81% and 141% respectively from 2009.~~

5.5.4 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 **had** 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 **was** 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 2010 relating to County Monaghan are included in Table 5.4 below.

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

Farm Type	Monaghan		Ireland	
	Number	% ⁷	Number	% ⁷
Specialist Tillage	25	0.6	4,795	3.4
Specialist Dairying	599	13.1	15,654	11.2
Specialist beef production	3,115	68.3	77,738	55.6
Specialist sheep	98	2.2	13,555	9.7
Mixed grazing livestock	238	5.2	14,697	10.5
Mixed crops and livestock	12	0.3	2,443	1.8
Mixed field crops	265	5.8	9,635	6.9
Other	213	4.7	1,343	1.0
Total	4,565	-	139,860	-

Source: Census of Agriculture 2010

⁷ Percentages have been rounded off.

According to the 2010 Census, the most popular type of farming in Monaghan is beef production which represents 68.3% of the farms compared to a national average of 55.6%. ~~One other dominant farm type is that of dairying with 24% of farms in this sector compared to an average of 18.57%. The percentage of dairy farms in the county has declined by almost half in the last decade.~~

4.7% of farms in Monaghan are in other farm types which can be accounted for by pigs, poultry and mushroom farming. Mushroom production, poultry rearing and pig rearing have always had a strong presence in County Monaghan. Recent significant investment in mushroom production facilities by organisations such as Monaghan Mushrooms has greatly expanded the capacity for production in the county. There has also been a significant increase in the construction of poultry and pig rearing units and also the expansion of existing units throughout the county. The three sectors provide significant employment and have the potential to represent a sizeable percentage of agricultural production in the county in the future. Given that these enterprises are generally located in the rural area, they also provide an important source of employment in these areas and generate demand for ancillary services.

~~A Census of Agriculture took place in June 2010. No details at a county level are available at present.~~

Objectives for Agriculture

- AGO 1.** Ensure that all plans and projects relating to agriculture are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- AGO 2.** Encourage the continued use of agricultural farm holdings and buildings.
- AGO 3.** Protect high quality agricultural land within the county.
- AGO 4.** Protect soil, **surface water**, groundwater, wildlife habitats, conservation areas, rural amenities and scenic views from adverse environmental impacts as a result of all agricultural practices.
- AGO 5.** Address the infrastructural deficit so as to serve the needs of agriculture, in co-operation with the appropriate agencies.
- AGO 6.** Realise the potential of tourism and agri-tourism as a means of contributing to farm diversification.
- AGO 7.** Support the development of value added agricultural based activities and agri-food enterprises.

5.6 Forestry

5.6.1 Forestry in Ireland

Forestry is an important renewable resource with a major role to play in sustainable rural development. Presently Ireland with 10.2% has the lowest proportion of land devoted to forestry of all the EU nations where the average is 30%. It is Government policy is to bring the national forest cover to 17% by 2030 and in 2010 forestry planting levels rose 25%. Monaghan County has one of the lowest proportions of land devoted to forestry nationally.

The national target of 17% is set out in the government document *“Growing for the Future: A Strategic Plan for the Development of the Forestry Sector in Ireland 1996”*. 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.

In December 2008 the Department of Agriculture’s Forest Service produced its *“Indicative Forestry Statement - The right trees in the right places”* The overall aim of the Indicative Forestry Statement (IFS) is to provide high-level, national guidance in relation to the suitability of land for afforestation. One of the key aspects of delivering a balanced programme is to ensure, as far as possible, that new forests integrate, enhance and reflect the diversity and local distinctiveness of the landscape in which they are set. It is also fundamentally important to provide the public and the forest industry with the earliest indication of the areas where potentially sensitive issues may arise in relation to, for example, landscape, water quality, archaeology and biodiversity.

The IFS is a map-based approach which integrates many different spatial datasets which take account of a wide range of environmental factors and other opportunities and constraints. The IFS identifies areas most suitable for planting primarily on the basis of environmental considerations and soil-productivity. The map-based environmental considerations have been captured from a variety of state organisations, such as the National Parks and Wildlife Service, the Fisheries Boards, the EPA and the Local Authorities. The forest productivity map incorporated within the Indicative Forestry Statement was compiled in co-operation with Teagasc and is based on soil type and elevation, displaying the potential rate of growth of forests throughout the country.

Most of County Monaghan outside the urban areas is indicated as being suitable for forestry with the exception of areas such as Bragan and Lough Muckno only being suitable for forestry for nature conservation and amenity.

5.6.2 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 the County. 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.

Objectives for Forestry

- FYO 1** Ensure that all plans and projects relating to forestry are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- FYO 2.** Realise the potential of forestry on rural economies through the promotion of appropriate related industries and rural tourism.
- FYO 3.** Protect natural water bodies, wildlife habitats, conservation areas, heritage areas, prominent landscape features, archaeological sites scenic routes and artefacts within forest sites and nature designations from pollution or injury
- FYO 4.** Promote mixed species forestry and selective felling rather than clear felling.
- FYO 5.** Prepare in co-operation with the Forest Service of the Department of Agriculture, Food and the Marine, an Indicative Forestry Strategy for the County during the lifetime of the plan where resources permit.

Climate Change, Energy and Renewable Resources

5.7 Climate Change, Energy and Renewable Resources

5.7.1 Climate Change

Climate Change is recognised as a potential threat to the future sustenance of the planet with potential negative impacts on landforms and people arising from a warming of the climate and resultant changes in weather patterns, rise in sea levels, loss of habitats, species and ecosystems and other natural occurrences.

In 2005 the Kyoto Protocol, a legally binding agreement under which industrialised countries will reduce their collective emissions of greenhouse gases by 5.2% compared to the year 1990, came into force. The goal is to lower overall emissions from six greenhouse gases - carbon dioxide, methane, nitrous oxide, sulfur hexafluoride, HFCs, and PFCs - calculated as an average over the period of 2008-12. National targets range from 8% reductions for the European Union and some others to 7% for the US, 6% for Japan, 0% for Russia, and permitted increases of 8% for Australia and 10% for Iceland.

In 2007, the European Union agreed new climate and energy targets “20-20-20 by 2020”. This requires a 20% reduction in greenhouse gas emissions by 2020, 20% energy efficiency by 2020 and 20% of the EU’s energy consumption to be from renewable sources by 2020. It is acknowledged that Greenhouse gas, CO₂, has the most significant effect on climate change. CO₂ mainly comes from fossil fuel use in the residential, services, manufacturing and transport sectors.

The National Climate Change Strategy 2007-2012 sets out how Ireland will meet its commitments to reduce greenhouse gas emissions in accordance with the Kyoto Protocol. Under the Kyoto Protocol Ireland agreed to a target of limiting its greenhouse gas emissions to 13% above 1990 levels by the first commitment period 2008-2012 as part of its contribution to the overall EU target.

County Monaghan has the capacity to meet energy requirements without depending entirely on fossil fuel resources. Renewable energy resources such as wind, are readily available in the county but are under utilised.

Objectives for Climate Change

- | | |
|---------------|--|
| CCO 1. | To have regard to implement where relevant and appropriate the National Climate Change Strategy 2007-2012 and any subsequent strategies. |
| CCO 2. | To facilitate measures which seek to establish a low carbon economy and society by 2020. |
| CCO 3. | To facilitate measures which seek to reduce emissions of greenhouse gases. |
| CCO 4. | To adopt sustainable planning strategies through integrating land use and transportation and by facilitating mixed use developments as a means of reducing greenhouse emissions. |

5.7.2 Renewable Energy

Directive 2009/28/EC on the promotion of the use of energy from renewable sources establishes the basis for the achievement of the EU's 20% renewable energy target by 2020. Under the terms of the Directive, each Member State is set an individually binding renewable energy target, which will contribute to the achievement of the overall EU goal.

Member states are to achieve their individual target across the heat, transport and electricity sectors and apart from a sub-target of a minimum of 10% in the transport sector that applies to all Member States, there is flexibility for each country to choose how to achieve their individual target across the sectors. Ireland's overall target is to achieve 16% of energy from renewable sources by 2020.

Directive 2009/28/EC requires each Member State to adopt a National Renewable Energy Action Plan (NREAP) and submit these to the European Commission. These plans are to set out Member States' national targets for the share of energy from renewable sources consumed in transport, electricity and heating and cooling in 2020, taking into account the effects of other policy measures relating to energy efficiency on final consumption of energy.

Ireland submitted its National Renewable Energy Action Plan to the European Commission in July 2010. The main aspects are as follows:-

- A target of 40% electricity consumption from renewable sources by 2020
- A robust framework for the development of a vibrant microgeneration sector
- Significant increases in the use of biofuels by all road transport fuel suppliers in their fuel mix
- A target of 10% electric vehicles by 2020
- A target of 12% renewable heat by 2020

The principal renewable resource accessible to technology at the present is wind energy, however other forms of renewable energy such as biomass, solar energy, hydropower (wave and tidal energy), and geothermal energy are being increasingly developed.

5.7.3 Efficient Use of Energy

Improving Ireland's energy efficiency is an essential part of Ireland's sustainable energy policy, and will play a vital role in reducing dependence on fossil fuels. The Government set out an energy policy framework in its White Paper: Delivering a Sustainable Energy Future for Ireland - the Energy Policy Framework for 2007-2020. This policy framework is designed to steer Ireland to a new and sustainable energy future; one that helps reduce greenhouse gas emissions and energy costs. Efficient energy use directly contributes to security of energy supply, sustainable transport, affordable energy, competitiveness and environmental sustainability.

Maximising Ireland's Energy Efficiency - The National Energy Efficiency Action Plan 2009 - 2020 was published on 8 May 2009 and sets out Government plans and actions to achieve its target of 20% energy efficiency savings across the economy in 2020. The plan highlights actions across the public sector, business, residential, transport and the energy supply industry to reduce energy consumption.

5.7.4 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, the strengthening of energy networks in the West, North West, Border and North Eastern areas in particular and the enhancement of the robustness and choice of energy supplies through improvements to the national grids for electricity and gas.

The Border Regional Planning Guidelines 2010-2022 (RPGs) highlights the following issues that need to be addressed in the long term:-

- Additional capacity in electricity networks is required to cater for the increase in generation, primarily from renewable sources.
- Enhancement of electrical connections between the Republic of Ireland and Northern Ireland
- Security of supply

The provision of energy supply, with a variety of supply sources is viewed as essential in achieving growth within a region. The main provider is the ESB, with Bord Gáis, Airtricity and other energy suppliers, including wind energy, increasing their share of the market. The Border RPGs requires development plans to facilitate the provision of energy networks and identifies the development of the North South electricity interconnector as one of two significant electricity network projects critical to the future development of the region.

5.7.5 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 and Eirgrid have a statutory responsibility to maintain and enhance electricity supply networks and both continue to improve the network of supply around the country.

The ESB and Eirgrid are also important in the facilitation of wind power, providing support for independent wind energy suppliers and purchasing generated power under the Renewable Energy Feed In Tariff (REFIT) market support scheme.

County Monaghan has, in terms of alternative energy significant potential for the development of wind. There is currently one operating wind farm of five turbines at Mullananalt, Ballybay with a production capacity of 7.5 MW of electricity. Planning permission has also been granted for five wind turbines at Tullynageer, north east of Castleblayney with a capacity to produce 10 MW of electricity. Applications for planning permission for two other similar size developments in the northwest of the county near Carrickroe are currently under consideration. However, the level of wind energy development and production in Monaghan is low when compared to other counties such as Cavan, and could be increased to assist in achieving the targets for renewable energy production set by the Government.

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

Bord Gáis has a gas main servicing industry 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, 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.

Objectives for Energy and Renewable Resources

- ERO 1.** Ensure that all plans and projects relating to energy and renewable resources development are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- ERO 2.** Promote and support an optimal mix of renewable energy generation within the county to assist in meeting the targets set out in the National Renewable Energy Action Plan
- ERO 3.** Promote and encourage the use of renewable energy sources in appropriate locations, where this can be done in an environmentally sensitive manner
- ERO 4.** Promote a 'plan-led' approach by identifying areas where there is significant wind energy potential, having regard to the Landscape Character Assessment for County Monaghan, through a landscape sensitivity analysis during the life of this plan.
- ERO 5.** Promote the growth and use of renewable energy sources from vegetation/biomass and support the implementation of the Bioenergy Action Plan for Ireland
- ERO 6.** Encourage the sustainable development of micro renewable electrical generation technology such as wind turbines, photo voltaic cells, micro combined heat and power plants.
- ERO 7.** Promote energy efficient buildings, using materials sourced from renewable resources in support of the implementation of those aspects of the Building Energy Directive relative to development management
- ERO 8.** Encourage efforts to reduce energy usage across all sectors in support of the implementation of the National Energy Efficiency Action Plan 2007-2020.

Objectives for Energy and Renewable Resources

- ERO 9.** Encourage the provision of alternative fuels in all new service stations/petrol forecourts in County Monaghan to assist in meeting the targets set out in the National Renewable Energy Action Plan
- ERO 10.** Facilitate electricity and gas infrastructure improvements/installations which will not result in adverse impacts on the natural or built heritage of the county.
- ERO 11.** Promote the extension of the gas network throughout the County.
- ERO 12.** Consider the identification of a strategic corridor in the county for major energy infrastructure

Industry

5.8 Industry

5.8.1 Industry in the BMW Region

The Border Midlands West Region, of which Monaghan is part, exhibits strengths in fields such as manufacture of Medical Devices, Processed Chemical and Materials, Computer and Communication Hardware, BioPharmaceuticals, Software & Communication services and Diversified Manufacturing and Processing. These are, in turn, supported by Science, Technology and Engineering Consulting Services.

The Industrial Developments Authority (IDA) Ireland Horizon 2020 strategy sets out specific targets for the period 2010 – 2014 which include the target that 50% of investments will be located outside of Dublin and Cork. Their focus will be on winning new investments in areas such as:

- Global services
- High-end Manufacturing
- Research, Development and Innovation and on sectors such as:
- Life Sciences
- Pharma and Biopharma
- Medical Devices
- Information and Communications Technology
- Financial Services
- Content Industry
- Consumer and Business Services
- Diversified Industries and Engineering
- Clean Technologies

In relation to driving regional economic development and in line with the National Spatial Strategy, the IDA proposes to make smart use of its property portfolio in regions targeted for investment. They have committed to working with local authorities to make potential sites as attractive as possible for investors. The IDA has also identified key areas of infrastructure improvement that are essential to attract new investments into the regions outside Dublin and Cork.

Transport and energy are vital but delivering next-generation networks is arguably the most important of all. Advanced Foreign Direct Investment (FDI) projects will require access to cloud computing, which in turn requires high-speed broadband access to be viable for mission-critical functions within a business. According to the IDA success in winning FDI for the regions requires constant vigilance on competitiveness. Local authority charges and infrastructure prices must not be a barrier to investment.

5.8.2 Industry in the Border Region

In 2008 industry provided 14% of employment in the Border region. 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.

5.8.3 Industry in County Monaghan

In 2011, County Monaghan's industries employed 13.9% of the working population representing a proportionately higher percentage than the national average. Details of large companies are outlined in Table 5.7 below.

Table 5.5: 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)

As of December 2008 there were a total of 1353* businesses in County Monaghan, those within the Service and Retail sectors account for 627, highlighting that these two sectors are significant. Construction and Manufacturing accounts for a total of 153 employers, and would traditionally be more representative of the county from an industrial perspective.

In terms of actual employment levels in county Monaghan, manufacturing businesses employing 2,292 persons and food related businesses employing 2,056 persons were responsible for providing employment to the most people in the county in 2008. Although services employing 1,626 persons and retail employing 1,577 persons have the second and third largest numbers of employers, the total numbers employed by each sector are lower. This indicates that these are often smaller businesses conducting their activities in the various urban centres around the county.

In 2008 the number of firms in Competitive Technology Sectors in Monaghan were as follows⁸:-

Scientific, Technical, Engineering & Consultancy Services	12
Processed Chemical and Materials	7
Software and Communication Services	2
Computer and Communication Hardware	1

The number of firms involved in each of these sectors in County Monaghan is small when compared to the numbers in County Cavan and the range of sectors providing employment in County Monaghan is limited when compared to those in County Louth.

Given that only 30% of the graduate population of Monaghan is employed, it could be concluded that County Monaghan is losing its graduate population to other counties and countries. This obviously has consequences in terms of offering a supply of skilled employees for any potential organisation expanding or locating within the county.

⁸ Kompas Business Directory December 2008

Table 5.6: Details of Large Company Type and Name in County Monaghan

Company Type	Number	Name
Food Processing	11	Grove Farms Silver Hill Foods Monaghan Mushrooms Town of Monaghan Co-op Rangeland Foods Rye Valley Foods Kerry 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 Laboratories
Medical Device	1	Randomed
Hospitality/Services	2	Four Seasons Hotel Group Hillgrove Hotel

Source: Final Report to the BMW Regional Assembly - Audit Innovation in the BMW Region 2011 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 5.7: 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.

Table 5.8: 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 5.9: 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.

Objectives for Industry

- INO 1.** Ensure that all plans and projects relating to industry are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- INO 2.** Ensure that sufficient and suitable land is reserved for new enterprise development at key locations throughout the county
- INO 3.** Promote new industrial development in other centres with existing infrastructural facilities, services, good communications, or where they can be provided at a reasonable cost.
- INO 4.** Encourage the growth and/or expansion of existing locally based small scale industry through the provision of suitably serviced sites.
- INO 5.** Co-operate with IDA Ireland, Enterprise Ireland, Forbairt, Forfás, Intertrade Ireland, 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.
- INO 6.** Ensure that a high standard of design, layout and amenity is provided and maintained in all new industrial developments.
- INO 7.** Promote Lough Egish as a centre for industrial development.
- INO 8.** Support an expanded education and research sector in County Monaghan.
- INO 9.** Continue to support and facilitate cross-border co-operation and trade between County Monaghan and Northern Ireland.
- INO 10.** Ensure that suitably serviced sites are accommodated in appropriate locations.
- INO 11.** Promote the protection and conservation of the existing environment in industrial areas

Extractive Industry

5.9 Extractive Industry

County Monaghan contains reserves of mineral materials including stone, sand, gravel and peat which are worked at many locations across the County. There is also potential for the extraction of precious and base minerals in 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.

Objectives for Extractive Industry

- EIO 1.** Ensure that all plans and projects relating to extractive industry are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- EIO 2.** 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.
- EIO 3.** Promote development involving the extraction of mineral reserves and their associated processes, where the Planning Authority is 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.

Retailing

5.10 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)

5.10.1 Retail Planning Guidelines

Subsequent to this Retail Planning Guidelines for Planning Authorities were published in January 2005. The five main policy objectives of these guidelines were 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.

In November 2011 the Department of Environment, Community and Local Government published draft Retail Planning Guidelines to succeed the current guidelines. These draft Retail Planning Guidelines provide a comprehensive policy and practice framework to guide:

- regional authorities in preparing retail policy objectives in regional planning guidelines;
- planning authorities in preparing and implementing development plans;
- planning authorities and An Bord Pleanála in assessing planning applications or planning appeals; and
- retailers and developers in preparing development proposals.

The draft Retail Planning Guidelines have a number of fundamental objectives:

- to protect, support and promote the continuing role of city and town centres;
- facilitating a competitive and healthy environment for the retail industry sector;
- preparing joint or multi-authority retail strategies;
- ensuring that all development plans incorporate clear policies and proposals for retail development; and
- promoting forms of development which are easily accessible, particularly by public transport, and located in such a manner as to encourage multi-purpose shopping, business and leisure trips.

The Guidelines state that planning for the retail sector must now be more focused on:

- the creation of vibrant, quality places, accessible by sustainable transport including for pedestrians and cyclists and within which retailing is an important activity;
- demonstrating clear evidence of need in identifying strategic requirements;
- planning for retail catchments that invariably straddle and transcend administrative boundaries;
- usage of clear and concise definitions and methodologies; and
- a general presumption against large retail centres located adjacent or close to existing, new or planned national roads / motorways.

5.10.2 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 draft Retail Planning Guidelines issued by the Department of the Environment, Community and Local Government in 2011.

The 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'.

A Retail Development Strategy for County Monaghan for the period 2012-2019 is currently being drafted and shall have regard to the provisions of draft Retail Planning Guidelines issued by the DECLG in 2011. The following objectives and policies are to be considered in conjunction with the Retail Development Strategy for the County 2012-2019 and will be used in controlling and guiding future retailing within the County.

Objectives for Retail Development

- RTO 1.** Ensure that all plans and projects relating to ~~extractive industry~~ retail development are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- RTO 2.** 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.
- RTO 3.** To improve accessibility to, and from, existing centres
- RTO 4.** To promote excellence in urban design including a general upgrade in the built environment and shop facades.
- RTO 5.** To improve the variety, range and quality of retail outlets within town and village centres.
- RTO 6.** To encourage alternative uses for vacant or derelict buildings.
- RTO 7.** Establish effective management and promotion of the county towns.
- RTO 8.** Review the Retail Development Strategy for County Monaghan during the plan period 2013 – 2019
- RTO 9.** Support the establishment of Shop Front Improvement Schemes to enhance the historic character and traditional street scene of the town(s) and create shop fronts which are more attractive for residents, visitors, shoppers and businesses.
- RTO 10.** Support the establishment of a Business Incentive Scheme to encourage the use of vacant premises in towns which will encourage diversity of retail opportunities within a designated area

5.11 Sustainable Tourism

5.11.1 Sustainable Tourism in North West

The number of visitors to Ireland continues to rise with over 6.6 million tourists visiting the country in 2009. Tourism in the North West generated 1.4m tourist visits and €319m revenue in 2009, 403,000 of which were overseas visitors, generating €140m in revenue. There were 754,000 tourist trips by Irish residents to the North West, earning the region €115m in revenue. While Northern Ireland residents made 254,000 tourist trips to the North West spending €64m. However, the tourism potential of Monaghan is not fully exploited as can be ascertained from comparing the visitors and revenues generated in other Border counties.⁹

Table 5.10: Tourist visitors and revenue in 2009

	Visitors (000s)	Revenue (€m)
Cavan	72	30
Donegal	161	43
Leitrim	27	14
Monaghan	32	12
Sligo	142	42

Since 2010 Monaghan is now part of Failte Ireland Midlands East administrative region which includes Louth, Meath, Kildare, Laois, Westmeath, Longford, Offaly and Wicklow.

5.11.2 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.

Co. Monaghan has a wide range of recreational activities to offer visitors including: golfing, angling, cycling, walking, rally-driving, quad-biking, equestrian activities, water skiing, canoeing, kayaking, mountain biking, wildlife trails, and hill walking. In addition there are many attractions such as the birthplace of Patrick Kavanagh at Inniskeen; Monaghan County Museum; high quality lace-making centred on Carrickmacross; the wildlife centre near Clontibret and historic houses with accommodation at Castle Leslie and Hilton Park. There is also opportunity to develop key festivals as attractions for tourists.

However, despite the many attractions that the county has to offer and the excellent and proximate transport connections, the number of visitors remains 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.

⁹ Failte Ireland 2009 figures

Thus tourism in the county is undeniably an underdeveloped resource. However the county has seen recent investment in recreational facilities with the new town trails in Monaghan, Clones and Carrickmacross, angling infrastructure at Lough Major; parks and amenity area enhancement; improved facilities at Lough Muckno Waterski Club and Ballybay Wetlands Centre and increased investment by the private sector in the standard and range of accommodation.

In addition, the county has recently secured funding for major flagship developments at Lough Muckno, Castleblayney and in Clones in preparation for the re-opening of the Ulster Canal through the INTERREG IVA Rural Development measure.

Co. Monaghan now needs to actively promote these new developments and avail of the opportunities afforded by social media e.g. Facebook, Twitter, YouTube to access target markets. On-going investment in and awareness of new technologies (e.g. iphone and android apps) is also vital.

Cross-border collaboration is hugely important for the county as is on-going co-operation and collaboration with Failte Ireland and Tourism Ireland in promoting the county and the wider Lakelands and Dublin's Doorstep areas both domestically and internationally.

Crucially, the natural resources upon which much of Monaghan's tourism product offering is based, need to be 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.

Objectives for Tourism

- TMO 1.** Ensure that all plans and projects relating to tourism are subject to policies AAP1-AAP5 contained within Chapter 4, Environment and Heritage, of the Monaghan County Development Plan 2013-2019.
- TMO 2.** Continue to assist and support agencies involved in tourism development and promotion
- TMO 3.** Encourage and support increased co-ordination, cohesion and linkages between the Council and Failte Ireland Midlands East
- TMO 4.** Support the implementation of the Tourism & Amenities Actions as outlined in the Economic Strategy & Implementation Plan for Co Monaghan 2010 – 2014 and any subsequent strategy
- TMO 5.** Optimise the current opportunities to develop rural tourism attractions/facilities provided by the National Rural Development Programme and EU funding programmes
- TMO 6.** 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. Focus tourism development efforts on developing a small number of key projects such as Lough Muckno Leisure Park, Ulster Canal, enhanced watersports

Objectives for Tourism

- TMO 7.** Encourage clustering and packaging of products to increase linkages within and reduce leakage from, the local economy. e.g. linkages between accommodation providers and activity/attraction providers
- TMO 8.** Capitalise on the natural resources of the area by working to protect and promote identified angling centres in the county, by facilitating the sustainable development of angling facilities at appropriate locations in the county, and by promoting the county as a centre of excellence for angling
- TMO 9.** Encourage the improvement of access, signage/interpretation and tourist information facilities
- TMO 10.** Establish Clones as a destination for cruisers upon completion of the reinstatement of the Ulster Canal
- TMO 11.** Establish Lough Muckno as a major international venue for angling competitions & festivals
- TMO 12.** Encourage the development of joint marketing activities with neighbouring counties, especially cross-border contacts
- TMO 13.** Continue to actively promote Co Monaghan using both existing and newly developing technologies
- TMO 14.** Encourage and support festivals as a method of attracting visitors
- TMO 15.** Support the incubation of new tourism, recreation and activity businesses where gaps occur and within clusters/hubs
- TMO 16.** 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-labelling.
- TMO 17.** 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
- TMO 18.** Evaluate public transport provision and where appropriate provide support for alternatives to the use of private cars to access visitor attractions.