

Economic Strategy for County Leitrim 2015-2021

Leitrim County Council

www.leitrim.ie

June 2015

Contents

Introduction	1
Economic Profile	3
Employment.....	3
Enterprise Performance.....	4
Education	5
Transport.....	5
Broadband.....	6
Water and Waste Water	6
Energy	6
SWOT Analysis of the Local Economy of County Leitrim	6
Economic Vision	8
Actions to Achieve the Economic Vision for County Leitrim	12
High Level Actions.....	13
Sector Specific Actions – Reflecting the High-Level Actions	16
Agriculture and food	16
Manufacturing, Financial and ICT	17
Creative & Arts	18
Energy Supply & Green Economy	19
Retail, Town Centre & Services.....	20
Education, Training & Skills.....	21
Implementation and Monitoring	22
Key Performance Indicators.....	24
Key Business Supports – Nationally, Regionally and Locally.....	25
Technical Annex of Supplementary Data and Information	29

Introduction

The primary goal of this Economic Strategy is to support the realisation of the overall Vision for County Leitrim as set out in the Leitrim County Development Plan 2015-2021, which was adopted by the elected members of Leitrim County Council in 2014. This envisages:

“County Leitrim to be a vibrant, socially inclusive, progressive and distinctive county, providing a good quality of life for all who work, live and visit the county and offering equal opportunities for employment to its people, while protecting, conserving and enhancing the best of the natural and built environment.”

Leitrim is a small county with a rural character located in the north-west of Ireland that enjoys many advantages including the quality of its environment and landscape, the welcoming nature and endeavour of its people, growing indigenous and foreign-owned businesses, and a widely dispersed, successful and supportive diaspora.

Regionally, the County is part of the EU NUTS II Border, Midland and Western (BMW) Region, within which Leitrim occurs in the NUTS III Border Region. It will form part of the proposed new Connacht-Ulster Regional Assembly area, under the Putting People First (2012) initiative. Regionally, therefore, Leitrim can be seen as benefiting from a number of identities – as a county located in the BMW Region and one which has also formed cross-border linkages with the ICBAN (Irish Cross Border Area Network) counties (Donegal, Sligo, Cavan and Monaghan as well as Leitrim in the Irish Republic and the Northern Ireland local authority areas including Omagh, Fermanagh, Cookstown, Dungannon and Armagh). Leitrim County Council has also been proactively involved in the Upper Shannon Erne Future Economy Project, which includes the counties of Cavan, Longford and Roscommon as well as Leitrim (details of the USEFE Project, which commenced in 2013, are presented in the Annex at the end of the Economic Strategy).

As the Irish economy creates new opportunities following the very difficult economic circumstances of recent years, County Leitrim is well positioned to grow its economy and jobs within the County, and support the wider economic development of its region. Leitrim County Council will play its part in supporting the economic development of the County.

In preparing this Economic Strategy, Leitrim County Council has been cognisant of:

- The challenges that have afflicted the Irish economy, and the regional economies of the West and Border Regions of Ireland in particular
- The changed policy context which highlights the primary role of local authorities in supporting and helping to drive the economic development of their counties and regions
- The Strategic Goals in respect of the Economic Development of County Leitrim which have been set out in the Leitrim CDP 2015-2021
- The wider regional context in the Connacht-Ulster region within which Leitrim is located and the large number of interdependencies that exist between Leitrim and its neighbouring counties.

County Leitrim Economic Development Strategy

This Economic Strategy is built on an evidence-based economic profile of County Leitrim and the formulation of an Economic Vision for the County, which includes evidence-based targets for generation of increased employment by 2021. To achieve the Economic Vision, a set of High Level Actions and Sector Specific Actions are specified.

The Economic Strategy is based on recent and relevant data and a number of analyses and studies conducted by Leitrim County Council and on its behalf. Other important inputs have included the views of individuals currently engaged in businesses and other economic activities in the County gained through focus groups held during 2014. During 16-17 January 2015, the Council hosted workshop sessions with the High Level Advisory Group to Leitrim County Council, which were very informative in helping to refine and sharpen the Economic Strategy. The High Level Advisory Group is composed of experienced and high profile individuals from business, academia and the policy environment with a connection to the County and who are committed to supporting the economic development of Leitrim in the coming years. During the process of preparing the Economic Strategy, independent analyses and advice was also provided by FTI Consulting and PMCA Economic Consulting.¹

The Economic Strategy comprises the following structure:

- An evidence-based Economic Profile of County Leitrim, including a SWOT Analysis of the County (Strengths, Weaknesses, Opportunities and Threats)
- An Economic Vision, including targets for employment generation within the County by 2021
- Actions, including High Level Actions and Sector Specific Actions within the County.

In addition, an outline of the enterprise supports available within the county and nationally is also included.

The Economic Strategy occurs in the policy context of radically changed circumstances in Ireland, in which public bodies are now expected to play a more proactive role in supporting economic development and job creation in their areas and wider regions. These changes are part of the overall reform process of the public service and reflect the local authority initiatives of Putting People First (2012) and the Local Government Reform Act of 2014. Leitrim County Council welcomes these changes and has sought to partner with business and industry in economic development for a number of years and believes that the County is well-placed to transform and regenerate its economic performance in the years ahead.

¹ The FTI-PMCA Consulting team carried out extensive data analysis in respect of the baseline/current economic profile of the County and its Economic Vision 2021. The team also participated in the focus groups in December 2014 and presented their analyses and Economic Vision at the meeting with the HLAG in January 2015 in Leitrim and at a meeting of the Leitrim County Council Strategic Policy Committee (SPC) for Economic Development at its meeting on 31 March 2015. The Annex of Supplementary Data and Information at the end of this document contains some of the key results of this economic profiling work and informs the SWOT analysis of County Leitrim presented in the main body of this document.

Economic Profile

Leitrim is a rural county with a low population density and a relatively high dependency rate, meaning that the proportion of its population of non-working age (young and old) is comparatively high. The County has a narrow base of economic activities but a relatively high proportion of jobs within knowledge sectors and a high proportion of entrepreneurial activity. Migration to nearby centres for work and study has also been a feature, and the County has seen appreciably large inward migration for work in foreign direct investment (FDI) activities – during the pre-crisis period, much of this pattern of employment was associated with the former MBNA facility in Carrick-on-Shannon and today Avant Card employs a large number of people in the Carrick Business Campus. The latter centre can be seen as a regional asset with significant further employment potential and features prominently in the Economic Strategy as a resource that can be promoted to achieve large-scale high value employment for the County and within the wider region.

Employment

The Central Statistics Office (CSO) POWSCAR (Place of Work, School or College – Census of Anonymised Records) data based on the 2011 Census of Population provides the baseline information on employment in County Leitrim. The local labour market comprises three strands of workers:

- Those working and living in Leitrim
- Those working in Leitrim but living elsewhere (inbound commuters), and
- Those living in Leitrim but working outside the County (outbound commuters).

Analysis of the POWSCAR data, which provides the most authoritative and detailed information on employment in the County, reveals that there were 8,042 (fixed location) jobs in County Leitrim in 2011. These jobs comprised 5,548 jobs among people both working and living in the County and a further 2,494 people who commuted into the County for work in that year.

In addition, there were a further 3,771 people who lived in the County but commuted outside of Leitrim for work in 2011.

The sum of the three categories of workers means that there were almost 12,000 jobs associated with the County in the last Census year (2011).

Category of workers	Number (2011)
1. Working and living in County Leitrim	5,548
2. Working in County Leitrim but living elsewhere (inbound commuters)	2,494
Total working in County Leitrim (1+2)	8,042
3. Living in County Leitrim but working outside the County (outbound commuters)	3,771
Wider Leitrim Employment (1+2+3)	11,813

Another way of looking at the 3,771 outbound commuters is to calculate the 'outbound commuter rate', namely the proportion of all jobs held by residents of County Leitrim accounted for by outbound commuters. In 2011, the outbound commuter rate for the County was 40.5%, meaning that about 41% of all residents of the County at work in any location worked outside of County Leitrim in that year. In this regard, County Leitrim had the twelfth highest outbound commuting rate among all local authority areas in the country in 2011 (County Roscommon had a higher rate of 44%). The comparably high outbound commuter rate reflects the importance of the wider region to the local economy of County Leitrim and the general principle that what is good economically for the County's neighbours is also good for Leitrim, and *vice-versa*.

With this in mind, it is worth looking in more detail at the commuters (both inbound and outbound), in terms of where they work and their other objective characteristics (the results of the detailed data analyses are contained in the Annex of Supplementary Information).

The main *destinations* of work for the outbound commuters in 2011 were Sligo, Longford, Cavan, Roscommon and Donegal. The main origins of the inbound commuters travelling into Leitrim for work were Roscommon, Sligo, Longford, Cavan and Donegal. The distribution of inbound commuters is more concentrated than the distribution of outbound commuters with most inbound workers travelling from Roscommon and most outbound workers travelling to Sligo.

Turning to *age distribution*, the proportion of outbound commuters aged between 20 and 44 years exceeds (67.5%) that of the State as a whole (62.6%). The age profile of workers living and working in Leitrim and those travelling into the County to work tends to be older when compared with the country as a whole.

The outbound commuters tend to have a higher *educational attainment* when compared with the country as a whole. In particular, over 44% of the outbound commuters had third-level or higher educational attainment in 2011, compared with the figure of 38% for the country as a whole.

In regard to *socio-economic groupings*, the proportion of professional, non-manual and manual skilled workers among the outbound commuters also exceeded the corresponding proportions for the country as a whole in 2011.

The *economic sectors* where County Leitrim has a higher proportion of workers engaged than the country as a whole include: agriculture, forestry and fishing (over one-in-ten); manufacturing, mining and quarrying, electricity, gas, watery supply and waste management (over 14%); and information and communication, financial, real estate, professional, administrative and support services (over 26%). The proportion of people working in the public sector is higher in County Leitrim when compared with the country as a whole and this reflects certain large public employers in the County.

Enterprise Performance

The percentage of jobs accounted for by FDI firms was high in 2011 at 11.5% or 921 jobs, but this has declined somewhat since then. There has been encouraging growth in Enterprise Ireland client employment since that year. There is an undoubted opportunity to enhance both FDI (IDA Ireland) and EI (larger indigenous enterprise) employment in the County during the 2015-2021 period of the recently adopted County Development Plan.

County Leitrim Economic Development Strategy

The transition from the former Leitrim County Enterprise Board to Leitrim LEO (Local Enterprise Office) occurred smoothly in 2014. Leitrim LEO will operate as a core instrument of local enterprise support and development for micro enterprises and SMEs, where the LEO will focus on providing clients with financial supports, mentoring, networking opportunities, business development and entrepreneurial advice, business training and information, and advice on local authority supports and/or activities affecting businesses, including rates, procurement and planning.

Leitrim LEO works in close collaboration with Leitrim County Council and among its significant achievements in recent years has been the development of The Hive in Carrick-on-Shannon. The Hive has become an important innovation centre in the County and part of the Economic Strategy is to seek to replicate this model at other locations throughout the County in order to facilitate the development of an 'innovation eco-system' catering for and supporting local entrepreneurs and SMEs in various sectors in recognition of the increasing importance of knowledge-oriented activities. The success of this Vision will be dependent on ensuring the availability of reliable and high-speed broadband, to which the Council is fully committed to achieving – in the context of rapid developments in the rollout of commercial mobile and fixed line networks and the Government's National Broadband Plan.

Recently published data from the Department of Jobs, Enterprise and Innovation (DJEI) show the record of employment growth among clients of Leitrim LEO, in comparative context. In 2014, Leitrim LEO had 126 clients who accounted for 388 jobs. Jobs growth in that year among the client firms of Leitrim LEO was 117 and this figure represented the highest jobs gain (in absolute terms) among any LEO in the Border Region. Proportionately speaking, the 117 jobs growth represented an increase of 43.2% during 2014, which was the highest rate of increase among any local authority outside of the capital in that year.

Education

Education is a fundamental driver of long term economic growth and locations with comparably strong educational attainment can harness their advantages to promote inward investment and high quality employment. While third-level or higher educational attainment among residents is lower in Leitrim when compared with the State, there has been an increase in third-level or higher educational attainment in the County since 1991. Leitrim also has a leading position in terms of the numbers of students attending third-level education in Ireland based on 2012/2013 enrolment figures produced by the Higher Education Authority in 2014. Further, as observed above in relation to employment, the outbound commuters at work have appreciably higher third-level or higher educational attainment compared with workers generally countrywide (44.1% versus 38%).

Transport

Key national and regional transport priorities included in the Leitrim CDP 2015-2021 are the proposed Carrick-on-Shannon and Manorhamilton By-passes, which would serve to improve the N16 cross route between Sligo and Enniskillen, and the N4 between Carrick-on-Shannon and Dromod. The regional route through the county joining Carrick-on-Shannon, Manorhamilton and Kinlough (R280) is planned to be upgraded to national primary status during the lifetime of the CDP.

County Leitrim is serviced by a number of Bus Éireann and private operator regional bus services with seven scheduled services to Dublin and Sligo each day. It is also served by the Dublin-Sligo

Íarnród Éireann train service with stops at Dromod and Carrick-on-Shannon with seven timetabled services each day. This train service is an infrastructural asset for tourism development in the County and it also facilitates an appreciably large number of jobs on a daily basis.²

Broadband

The availability of broadband services is recognised as essential for economic development, particularly of the regions. Connectivity opens up opportunities for businesses of all sizes and in all sectors. This is an exciting time in the ongoing digital revolution. Commercial operators are investing in their networks, providing data capability and higher speed mobile networks, including 4G and 4G+, and faster fibre-based fixed line networks.

Leitrim County Council has mapped broadband coverage across the County. Leitrim has Metropolitan Area Networks (MANS) in Carrick-on-Shannon and Manorhamilton. Carrick-on-Shannon has also been earmarked as a location for Phase One of a fibre-to-the-building (FTTB) network being rolled out by a joint venture between the ESB and Vodafone. However, access to commercially provided broadband networks during their initial rollout phases is largely determined by the underlying business case. The National Broadband Plan (NBP) is intended to address areas where commercial services may not come on stream within a reasonable period. Thirty-three such 'intervention' areas have been identified in the County under the NBP and it is planned that State assistance for rectifying broadband availability in these areas will come on stream in 2016. This initiative will be key to the economic development of the County in the coming years.

Water and Waste Water

Water supply and waste water treatment services are critical services to business and are an essential requirement for economic development. Significant investment has been undertaken in upgrading the water supply and water treatment facilities in County Leitrim. While responsibility for services has transferred to Úisce Éireann (Irish Water), sufficient capacity is available to meet the needs of major employment in the main centres in the County.

Energy

The provision of transmission grid infrastructure is the responsibility of EirGrid, with ESB Networks providing the distribution system network. An infrastructure deficit may exist for the location of certain activities that are dependent on high voltage connections directly to the grid and the presence of dark or unlit fibre (for instances, data centres). Furthermore, existing and planned-for grid connections for renewable energy generation in the form of wind and biomass are already fully subscribed. Further development of the national transmission grid will open the opportunity for the development of further renewable generation in the county.

SWOT Analysis of the Local Economy of County Leitrim

The following table presents a SWOT analysis of the local County Leitrim economy and is based on the foregoing economic profile and the detailed economic analyses undertaken by the FTI-PMCA consultancy team. (Details of the data analysis underpinning the SWOT overleaf are provided in the Annex at the end of Economic Strategy. The SWOT also reflects the focus groups and HLGA meetings in December 2014 and January 2015 respectively.)

²Of the 3,771 outbound commuters from County Leitrim in 2011, 160 or 4.2% of the total commuted to work in Dublin (mostly making use of the train service to the capital) (see Table A2, p. 40).

SWOT Analysis of the Local County Leitrim Economy	
<p>Strengths</p> <ul style="list-style-type: none"> • Reputation for high quality of life • A clean and green county • Cost-competitive location • Improved transport links from the south/Dublin • Carrick-on-Shannon has broad economic and transport base (including rail to Dublin and Sligo) • Manufacturing in Tier 2A towns (FDI and Irish-owned) • Entrepreneurial spirit and track record of success • Talented labour pool – outbound commuters and regionally • Educational attainment and skills of outbound commuters • Progression of second-level pupils to third-level studies • Network of enterprise/incubation centres • Tourism – small numbers but high average spend • MANs in Carrick-on-Shannon and Manorhamilton • Proactive council – intelligence and relationships 	<p>Opportunities</p> <ul style="list-style-type: none"> • Promote Leitrim within its regional context • Carrick-on-Shannon Business Campus – turnkey condition and regionally significant asset • Recovery in larger indigenous firms • Tourism – Wild Atlantic Way and Centreparks investment in nearby Longford represent significant opportunities for County Leitrim • Impressive champions for County Leitrim – HLAG& others • Labour pool positives for inward investment • Clear idea of key sectors <ul style="list-style-type: none"> ○ Agri-food ○ Tourism ○ Energy/green ○ Retailing ○ Engineering and manufacturing ○ Services – domestically-traded ○ Services – internationally-traded ○ Creative/arts – traditional and digital • Links with HEIs (Sligo IT, NUIG) – local delivery • EU Regional Aid Map 2014-2020 • CEDRA – REDZs • Cross-border initiatives (ICBAN etc.) • Rollout of high speed fibre based broadband networks from commercial operators • National Broadband Plan
<p>Weaknesses/Issues</p> <ul style="list-style-type: none"> • Small rural county in peripheral part of Ireland • Transport infrastructure (public transport in rural area) • Broadband (33 ‘intervention’ areas under NBP) • Low third-level/higher educational attainment among residents and/or those at work within the County • Narrow base of economic sectors including reliance on agriculture and the public sector • Reliance on small number of large employers • Leakage of economic activity to surrounding centres • Older workforce (apart from the outbound commuters) • Sharp decline in FDI employment • Very low number of IDA site visits (but up recently) • Image of County Leitrim as low priority location 	<p>Threats – Various Levels</p> <ul style="list-style-type: none"> • <i>Economic</i> <ul style="list-style-type: none"> ○ Political cycle – risk of ‘own goals’ ○ European stagnation ○ FDI – OECD (BEPS), EC, US ○ Uncertainty →↓ investment • <i>Institutional</i> – local authority reform process etc. • <i>Infrastructural</i> <ul style="list-style-type: none"> ○ Road improvements delayed ○ NBP timeline ambitious • <i>County</i> – greater competition from other locations

Economic Vision

The Economic Vision for County Leitrim is for

“A vibrant economy making a significant contribution to the well-being, skills and aspirations of those working and living in County Leitrim, and the wider North West region, through the provision of sustainable employment and business opportunity in the traditional and emerging knowledge-orientated sectors.

Not only will total employment in County Leitrim increase, the share of jobs in key targeted sectors including agriculture and food, manufacturing, financial and ICT, creative and arts, energy supply and green economy, retail town centre and services and tourism will increase and thereby both maximise knowledge-orientated economy activity and broaden the economic base of the County.

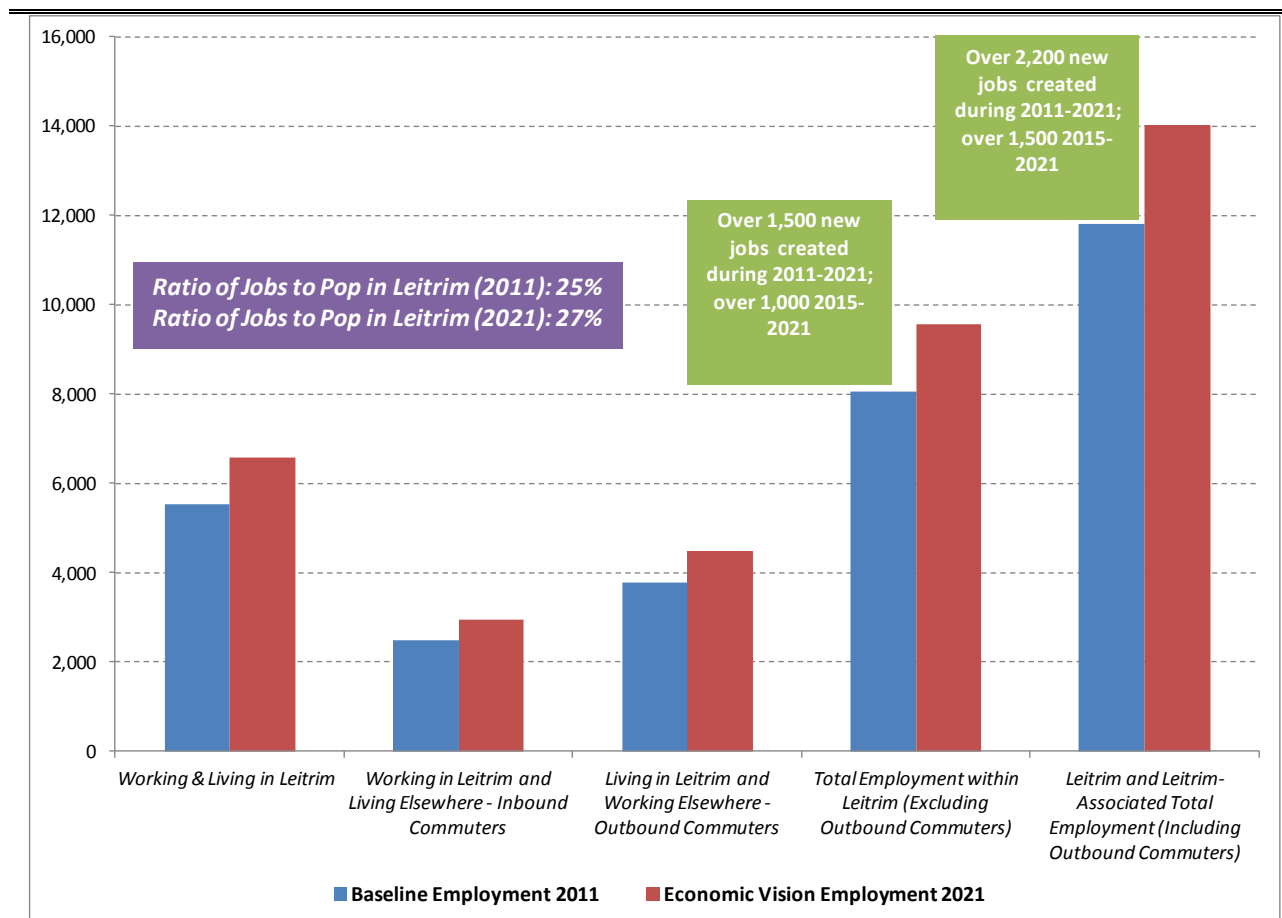
In fulfilling this Economic Vision, Leitrim County Council will work with and support all stakeholders and partners who share this Economic Vision and can contribute to employment growth and sustainable economic development in the County and its wider region, including on a cross-border basis.”

The Economic Vision for County Leitrim includes the creation of approximately 1,000 new jobs in the period 2015-2021 or in the region of 1,500 where outbound commuters are also taken into account.

In formulating the Economic Vision, the baseline employment levels within the County in 2011 as provided by the CSO POWSCAR data on a geographic and sectoral basis have been projected forward using projections for the Irish economy from the International Monetary Fund (IMF), the Department of Finance and the Government’s Medium Term Economic Strategy (MTES 2014-2020). Information gleaned from a series of sectoral focus groups held during 2014 and the existing pattern of employment across the county from a geographical perspective have also been taken into account together with the economic/urban settlement hierarchy provided for in the CDP for County Leitrim 2015-2021.

These ‘illustrative’ jobs projections are based on the latest available baseline data and take into account informed economic trends to 2021. The jobs/population ratios in 2011 and 2012 indicate the sustainability of the projections, which are also mindful of the National Housing Strategy.

Illustrative Projections of Persons Employed in County Leitrim at 2021 – Comparison with the Baseline Situation in 2011 (Exclusive and Inclusive of Outbound Commuters)



It is an objective of the Economic Strategy to achieve even larger shares of employment in certain key sectors by 2021 compared with the baseline 2011 percentages, namely, in manufacturing-related activities (10.3%); in wholesale and retail service activities (23.6%); and in ICT, financial, business and professional services (17.9%) in order to maximise the penetration of knowledge-orientated activities and to broaden the economic base of the county. These sectors are illustrated by the green rings in the table below. It is expected that employment growth will also occur in the other sectors shown in the table.

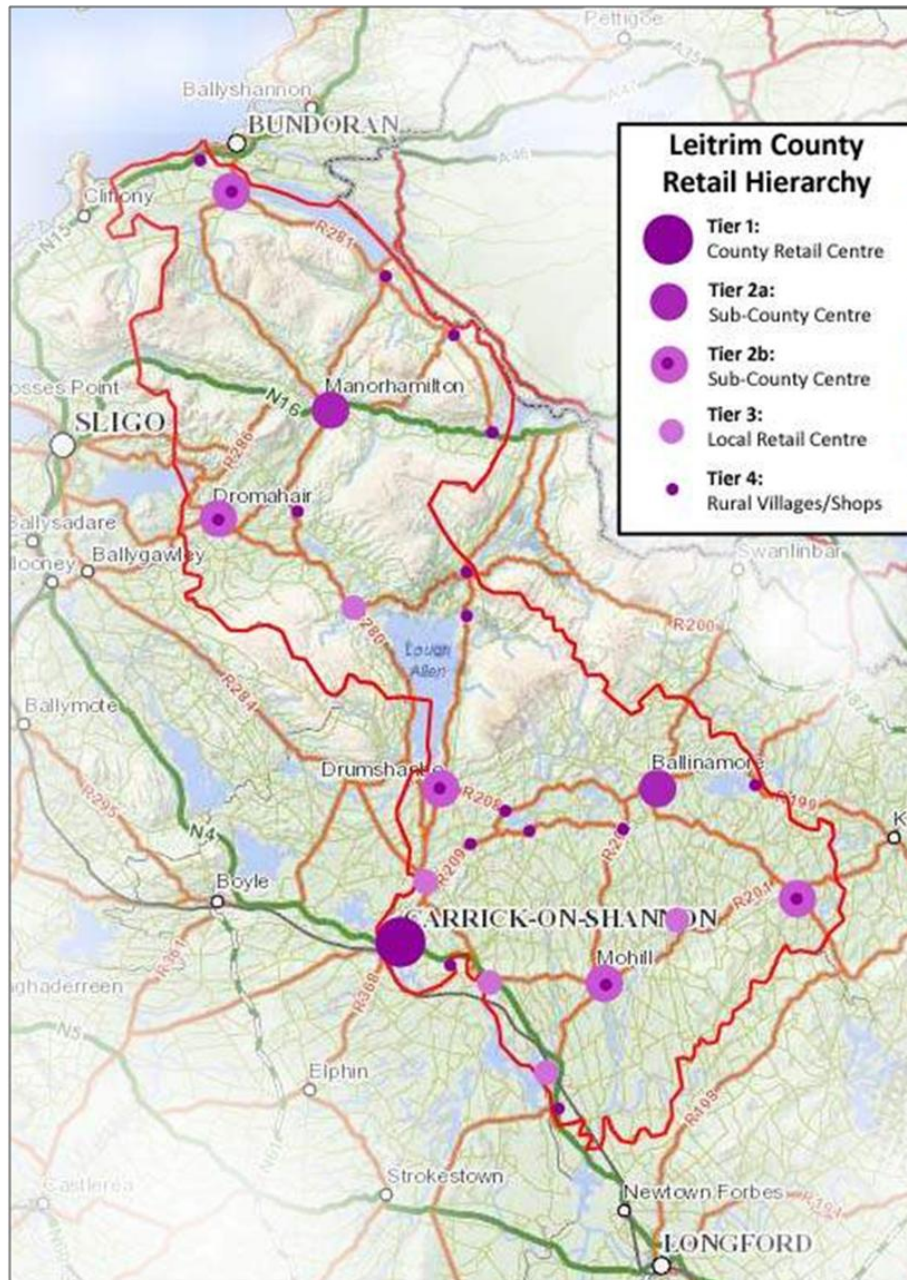
Illustrative Sectoral Distribution of Employment in County Leitrim at 2011, 2015 and 2021

1,029 new jobs created 2015–2021

Total Employment <i>within</i> Leitrim	Persons Employed			
	2011	2015 (e)	2021 (e)	%
Total	8,042	8,528	9,557	100.0%
1 Agricultural, forestry & fishing	665	705	790	8.3%
2 Manufacturing, mining and quarrying, electricity, gas, water supply and waste management	831	881	988	10.3%
3 Construction	154	163	183	1.9%
4 Wholesale, retail trade, transportation and storage, accommodation and food service activities	1,898	2,013	2,256	23.6%
5 Information and communication, financial, real estate, professional, administration and support service activities	1,438	1,525	1,709	17.9%
6 Public administration and defence; compulsory social security	777	824	923	9.7%
7 Education, human Health and social work activities	1,831	1,942	2,176	22.8%
8 Other service activities	323	343	384	4.0%
9 Not stated	125	133	149	1.6%

While important business and farming activities take place throughout the County, the existing economic centres are likely to continue to drive economic activity and jobs growth between now and 2021.

Taken together, Tier 1 (Carrick-on-Shannon) and Tier 2A and Tier 2B centres (Manorhamilton, Ballinamore, Kinlough, Dromahair, Drumshanbo, Mohill and Carrigallen) as provided for within the urban settlement hierarchy of the CDP 2015-2021 accounted for 70% of all employment within the County in 2011 (based on analysis of the CSO POWSCAR data). This pattern of geographical concentration of activity is likely to continue with Tier 1 and Tier 2A towns (Carrick-on-Shannon, Manorhamilton and Ballinamore) likely to be the principal locations for FDI. Small business growth is envisaged to occur throughout the County in various sectors, including agri-food, tourism and in activities such as the creative arts and digital content sector, where County Leitrim has a tradition.



Actions to Achieve the Economic Vision for County Leitrim

The Economic Vision for County Leitrim will be achieved by focused High Level and Sector-Specific Actions. These Actions will be co-ordinated by Leitrim County Council, working in tandem with partner stakeholders locally and regionally, and with periodic monitoring and appraisal as to their effectiveness. Key structures under the auspices of the Council are the Strategic Policy Committee (SPC) for Economic Development and the High Level Advisory Group on Economic Development (HLAG). Leitrim County Council is already proactively engaging with a number of external stakeholders in promoting economic and employment development in the County and it will continue to work proactively in this manner throughout the planning period (2015-2021).

What follows are tabular presentations of the High Level and Sector-Specific Actions to implement the Economic Strategy for County Leitrim. The Sector-Specific Actions emerged from specially convened focus groups hosted by Leitrim County Council during the past year, which acted as a sounding board for local business interests regarding impediments and opportunities.

Against each Action are shown the following:

- Sustainable Economic Development Objectives (SEDOs), which will be specific, measurable and time-bound
- Stakeholder partners (with LCC);³ and
- Timing.⁴

Lead responsibility for the implementation of all Actions will rest with Leitrim County Council and further commentary on the implementation and monitoring of the Actions is outlined subsequently.

³In addition to the stakeholders mentioned in the Actions overleaf, the High Level Advisory Group, which includes high profile and experienced leaders with strong connections to Leitrim, cannot be underestimated. The HLAG will act as a champion for economic development within the County and will connect with the worldwide Leitrim diaspora as well as the business and policy worlds in Ireland.

⁴In regard to timing, LCC will/should not become overly preoccupied with precise start and end-dates for particular Actions, which could imply completion when the reality may be otherwise and that all Actions identified (High Level and Sector-Specific) are ongoing and need to be implemented during the planning period of 2015-2021. Monitoring and tracking the success of the Actions with objective, independent data will be fundamentally to the success of the Strategy.

High Level Actions

High Level Action	SEDO	Stakeholder Partners	Timing
1. <i>Internal Engagement: LCC will adopt, disseminate and put into effect the Economic Strategy for County Leitrim 2015-2021 at all levels within and across the organisation.</i>	Promotion of economic development and employment locally and regionally. Ensuring a more systematic approach to Council functions etc.	Elected representatives	By Q3 2015.
2. <i>Engagement with State Agencies: LCC will proactively engage with the IDA, EI, Leitrim LEO, Fáilte Ireland, Bord Bia, Teagasc, Coillte (forestry, biomass, energy) etc.</i>	Enhancement of the economic base of Leitrim and its region by facilitating greater employment among FDI firms, larger indigenous enterprises and micro enterprises. Supporting the growth of tourism locally and regionally.	IDA (FDI), EI (larger indigenous firms), Leitrim LEO (micro enterprises), Fáilte Ireland and Tourism Ireland (tourism), Bord Bia, Teagasc (agri-food), Coillte (forestry, biomass, energy).	From Q2 2015.
3. <i>Regional Context: LCC will engage within its region – within Ireland and on a cross-border basis. The regionally significant Carrick-on-Shannon Business Campus provides a major opportunity for new FDI in Leitrim and regionally.</i>	Enhancement of the economic base of Leitrim and its region by facilitating greater employment among FDI firms, larger indigenous enterprises and micro enterprises. Supporting the growth of tourism locally and regionally.	Existing Border Regional and West Regional Authorities and the proposed new Connacht-Ulster Regional Assembly. ICBAN (Irish Cross Border Area Network) and NI local authorities. Western Development Commission.	From Q2 2015.
4. <i>Engagement with Higher Education Institutions: LCC will proactively engage with HEIs in its wider region. This Action is designed in part to circumvent the absence of a HEI in Leitrim.</i>	Facilitation of the development of an innovation eco-system locally and regionally that will support the growth of knowledge-oriented economic activities in Leitrim and its wider region. Enhancement of skills and training among employers and employees in the County.	Sligo IT, Athlone IT, NUIG, DkIT, lyit etc. LCC has facilitated HEIs to run skills and training programmes for businesses within the County, illustrating that there is no disadvantage to not having a HEI in Leitrim.	From Q2 2015.
5. <i>Engagement with Businesses, Developers and Wealth Creators: LCC will engage with businesses, developers and wealth creators. LCC will be aware of how best LCC can serve businesses and wealth creators, who directly deliver jobs (whilst ensuring sustainable development).</i>	Attracting investment and new enterprise with significant employment, income and growth potential, and improving the quality and diversity of employment.	Potential investors and enterprises contemplating establishing operations in Leitrim (FDI or Irish-owned) and/or developers with clients thinking of investing. Chambers of commerce and business associations in the County.	From Q2 2015.

County Leitrim Economic Development Strategy

<p>6. <u>Activities and Urban Centres</u>: LCC will promote key activities, including agri-food, forestry and renewable energy, engineering and manufacturing, internationally-traded services, retailing and wholesaling, domestically-traded services and tourism. Priority urban centres for FDI – Tier 1 & 2A; general economic development – Tier 1-4 (Leitrim CDP).</p>	<p>Facilitating balanced economic and employment growth throughout the County and contributing to sustainable communities throughout Leitrim.</p>	<p>State agencies, businesses, developers and wealth creators (as mentioned above); local community groups and organisations.</p>	<p>From Q3 2015.</p>
<p>7. <u>Planning and Infrastructure</u>: LCC will have-at-the-ready at any given time assessments of available infrastructure and services on all sites identified for economic development in the County. The goal will be to prepare and regularly update a 'sites development matrix' to make the county more competitive for inward investment and address services deficits on an ongoing basis.</p>	<p>Facilitating the County to be more attractive to inward investors (FDI and indigenous) by working to ensure needs-based services and infrastructure around the County (addressing the issue of broadband availability will be key to this Action).</p>	<p>Central Government Departments, including the DECLG, DCENR and the DJEI (roads and broadband).</p>	<p>From Q3 2015.</p>
<p>8. <u>Audit and Inventory of Enterprise Workspaces</u>: LCC will develop an inventory of all workspaces and properties in the County for enterprises of all types – small, large, FDI and indigenous etc.</p>	<p>Help to make the County more competitive to all forms of businesses (FDI and indigenous) and to support entrepreneurs and growing businesses to locate suitable work premises, thereby supporting the objective of inculcating an innovation eco-system in the County.</p>	<p>Leitrim LEO and estate agents with knowledge of workspaces in the County.</p>	<p>From Q3 2015.</p>
<p>9. <u>Rural Economic Development Zone (REDZ)</u>: LCC will consider the possibility of designating a site or sites in the County as an REDZ (Rural Economic Development Zone) under the recently published CEDRA Report, in recognition of the rural nature of the county and the possibility of funding for the initiative becoming available.</p>	<p>Balanced County-wide economic growth in support of the rural tradition and fabric of Leitrim and its communities.</p>	<p>DECLG (lead responsibility), private sector, chambers and business associations, community and voluntary groups etc.</p>	<p>From Q3 2015. A call for proposals for REDZ on a pilot basis is open (2 June-31 August 2015) and the DECLG will determine successful applicants by the end of 2015.</p>
<p>10. <u>Broadband</u>: LCC will pursue the expansion of modern broadband within the context of the National Broadband Plan (NBP).</p>	<p>Balanced County-wide economic growth in support of the rural tradition and fabric of Leitrim and its communities, local entrepreneurship etc.</p>	<p>DCENR (lead responsibility). The NBP process includes State Aid considerations (with the EU). If and when this requirement is satisfied, the State will tender for the provision of broadband in the 'intervention areas'.</p>	<p>From Q2 2015. LCC has been proactive in engaging with the DCENR on the NBP and this will continue until the roll-out is expected to commence in 2016.</p>

County Leitrim Economic Development Strategy

<p>11. <u>Regional air access to the Region:</u> LCC will work to facilitate enhanced air access to the region.</p>	<p>County and regional sustainable economic and employment growth.</p>	<p>Existing international airports (Knock), regional airports, Department of Transport</p>	<p>From Q3 2015.</p>
<p>12. <u>Quality of life:</u> LCC will facilitate support for the arts, sport, recreation and heritage to enhance the quality of life in the County for its communities.</p>	<p>Sustainable and vibrant communities within the County (in line with the overall vision of the Leitrim CDP 2015-2021).</p>	<p>Department of Arts, Culture and Heritage, Department of Transport, Tourism and Sport, Arts Council, Sports Council etc., County Leitrim LCDC (Community Element of the Leitrim LECP)</p>	<p>From Q3 2015.</p>
<p>13. <u>Marketing and Promotion:</u> LCC will lead a series of complementary marketing initiatives aimed at promoting the County as an investment location and place to live, work and visit. Initiatives include the development of a social media strategy, national newspaper/media supplements, bespoke video/packet, info-graphic data promoting the County or sites/properties therein (e.g. Carrick-on-Shannon Business Campus). Attention will also be paid to liaising with primary and secondary schools within the County, to help inform pupils of career options in business and raising the profile of successful enterprises locally so that LCC will seek to champion entrepreneurship at all stages of the educational life-cycle.</p>	<p>Ensuring that all relevant audiences in respect of investing in, working in, visiting and returning to Leitrim are informed of the opportunities open to the County in the coming years. Promotion of FDI, tourism, local pride etc.</p>	<p>Businesses, investors and wealth creators; State enterprise and tourism agencies; schools and educational organisations (Leitrim ETB); Leitrim champions and diaspora.</p>	<p>From Q2 2015.</p>

Sector Specific Actions – Reflecting the High-Level Actions

Agriculture and food

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. LCC will ensure that local buyers (retailers) are informed of local produce and offerings through the production and distribution of product lists, 'meet-the-buyer' and similar networking events.	Facilitating the growth and sustainability of local supply chains – suppliers, wholesalers and retailers through ensuring that all are properly informed of what is available in a 'win-win' situation.	Local farming and agri-food groups and initiatives, retailers and chambers/business organisations.	From Q2 2015.
2. LCC will act to develop a model/network of mentoring to address issues having an impact on small agri-food businesses (e.g. transport, equipment, training etc.)	Supporting local agri-food businesses to deal with constraints on their growth in a rural, peripheral location.	Local farming and agri-food groups and initiatives, Leitrim LEO, chambers and business groups, educational institutions, retired business people.	From Q2 2015.
3. LCC will work in partnership with Bord Bia to facilitate local producers having better access to national and international markets.	Supporting local growers and agri-food businesses to serve new markets, thereby facilitating their expansion and sustainability.	Local farming and agri-food groups and initiatives, Bord Bia.	From Q2 2015.
4. LCC will consider the opportunity for a partnership model of farming to look at the effects of fragmentation and age profile	Supporting sustainable long-term farming in the County, where primary food production accounts for a large share of employment	Local farmers, farming organisations, agricultural consultants, Teagsac etc.	From Q3 2015.
5. LCC will work to develop a Leitrim/Regional food website to help with regulations, group marketing etc.	Supporting local agri-food businesses to comply with regulations and broaden market access etc.	Leitrim LEO, neighbouring local authorities, regional assembly	From Q2 2015.
6. LCC will assist the restaurant trade in promoting the potential of a '30k' menu initiative in the County	Supporting local agri-food producers and retailers with broadened markets.	Local agri-food businesses, restaurants, hotels, pubs etc., Fáilte Ireland, Tourism Ireland	From Q3 2015
7. LCC will work to ensure that all enterprises in this sector are well-informed of relevant enterprise supports available in the county.	Supporting the viability, expansion and sustainability of agri-food entrepreneurs and businesses throughout the County.	Local farming and agri-food groups and initiatives, Leitrim LEO, EI, Bord Bia etc.	From Q2 2015.
8. LCC will explore the possibility of partnering with other local authorities on a cross-border basis with the aim of accessing EU funding for food innovation and/or market access supports.	Facilitating exporting and diversification of markets as well as helping to build cross-border and EU solidarity.	ICBAN, NWCBP, EBR, Irish Office (Brussels).	From Q3 2015.
9. LCC will liaise with the IDA regarding the possibility of attracting FDI in the agri-food sector to Leitrim.	Diversification of the agri-food sector and linkages with the indigenous supply	IDA.	From Q3 2015.

County Leitrim Economic Development Strategy

10. LCC will work with Fáilte Ireland to promote food tourism and/or potential synergies between food and tourism in Leitrim, particularly along the Blueway,	Further diversification of the agri-food sector in the County and regionally, plus cross-fertilisation of sectoral growth (agri-food and tourism) building on major national initiatives (e.g. The Wild Atlantic Way).	Fáilte Ireland, Tourism Ireland	From Q2 2015 – need to act rapidly regarding this action owing to the favourable exchange rate in respect of Ireland and the expectation that the Summer 2015 season will be significant for the Irish tourism industry.
---------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Manufacturing, Financial and ICT

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. LCC will ensure that all enterprises in this sector are well-informed of all enterprise supports available in the County, and regionally/nationally.	Addressing the general issue that lack of information on available business supports can hinder the growth of enterprises and jobs growth.	Leitrim LEO	From Q2 2015.
2. LCC will work with the IDA to attract FDI in the following sub-sectors in Leitrim: internationally-traded services (financial services, insurance services, business practice operations, call centres); manufacturing (mid-tech and life sciences); agri-food; and renewable energies.	Broadening of the economic base of activities within the County and facilitating more economic impact being retained locally, whilst also benefiting the region.	IDA, developers and wealth creators who can act as a catalyst for inward FDI.	From Q2 2015.
3. LCC will engage with IDA Ireland on the Carrick-on-Shannon Business Campus and broader positioning of Carrick-on-Shannon and other centres and workspaces amenable to FDI within the County (Tier 1-2A).	Realising the spare capacity (c. 800 full-time equivalent jobs) at the Carrick-on-Shannon Business Campus, which is a regionally significant asset.	IDA.	From Q2 2015.
4. Included in this strategy is the potential for inward investment from existing FDI located at other centres as potential overflow/additional centres in County Leitrim.	Taking a broad approach to FDI – peripheral locations like Leitrim recognise the reality that they can complement major host locations like Dublin in providing competitive locations for overflow/additional workspaces for multinationals already established in Ireland.	IDA.	From Q2 2015.
5. LCC will develop the business case and messaging for FDI into the County including lower costs, cheaper accommodation, skills availability and employee loyalty.	Building a realistic and credible FDI plan that plays on the relative strengths of Leitrim, which include being a cost-competitive location with skills availability in its region.	IDA, developers, wealth creators, potential investors.	From Q2 2015.

County Leitrim Economic Development Strategy

6. <i>LCC will work with EI to ensure that larger locally-owned enterprises in this sector are supported for development in key functions, including market expansion, exports and innovation.</i>	Supporting the growth and employment development of successful Irish-owned enterprises in Leitrim. It is also important to facilitate progression from LEO to EI and to track progress on this as evidence of growth.	EI and their client companies in Leitrim, Leitrim LEO.	From Q2 2015.
7. <i>LCC will work to raise awareness of the profile of the skills base of the Leitrim diaspora.</i>	Facilitating the possibility of emigrants returning to their home county.	Leitrim associations in the UK, US and other countries, HLAG, media – social and printed	From Q3 2015.
8. <i>LCC to facilitate connecting with the Leitrim diaspora with a view to promoting inward investment into the County and emigrants to return home.</i>	Broadening of the economic base of activities within the County and facilitating the possibility of emigrants returning to their home county.	Connect Ireland, GAA, Leitrim associations in the UK, US and other countries and other networks.	From Q3 2015.
9. <i>LCC to facilitate the development of Leitrim as a step-down incubation facility and increase knowledge transfer through linkages with local colleges.</i>	Broadening of the economic base of activities within the County, with a particular emphasis on development of knowledge activities.	HEIs in the wider region (Sligo IT, Athlone IT, NUIG, DkIT, lyit etc.), Leitrim LEO, EI, DJEI (Regional Action Plan for Jobs).	From Q2 2015
10. <i>LCC to promote new start-ups through the possibility of promoting 'Business/Agency Welcoming Team Model'.</i>	Supporting local entrepreneurship in the County.	Leitrim LEO, local chambers and business associations, mentors, enterprise centres.	From Q2 2015

Creative & Arts

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. <i>LCC will work to bridge the apparent gap between the creative/arts/cultural sector in Leitrim and mainstream business.</i>	Bridging the 'gap' between the sector and the mainstream business community in a 'win-win' situation for all concerned.	Arts Office within LCC and local artist groups and initiatives, local retailers, chambers and business groups	Q3 2015.
2. <i>LCC will consider the possibilities associated with particular initiatives in Leitrim – film festival of national/international appeal, promotion of Leitrim as a destination for filming etc.</i>	Promoting the arts and entertainment sector in Leitrim, for which there is a strong tradition over many years.	Arts Office within LCC and local artist groups and initiatives, local retailers, festival groups and organisers.	Q3 2015.
3. <i>LCC will ensure the development and promotion of digital content arts/design/creative materials in Leitrim as well as non-digital.</i>	The digital content sector, which includes e-publishing, online content, broadcasting and music technology, pervades the economy and has scope to fit in with Leitrim's traditions in the creative sector.	Arts Office within LCC and local artist groups and initiatives, The Hive workspace, HEIs. The success of this sector in the County will be dependent on addressing the issue of broadband availability.	Q4 2015.

County Leitrim Economic Development Strategy

4. LCC will build on the success of 'The Hive' as input into the enterprise/innovation eco-system of the County, including business networking and the provision broadband and other services. LCC will examine the development of additional Hives at other centres but particularly in the north of the County.	Facilitating of the wider knowledge-oriented economy in Leitrim and its region – including the aforementioned digital content sector etc.	Leitrim LEO, The Hive, EI and other Enterprise Centres throughout the County.	Q4 2015.
5. LCC will examine the establishment of a start-up/'angle investor' fund for businesses locating in County Leitrim (as part of support the enterprise/innovation eco-system).	Complementing the preceding Action. The goal is to have local enterprise centres throughout the County have a range of business supports available, including attractive workspaces, broadband and funding options for entrepreneurs.	Leitrim LEO, The Hive, EI and other Enterprise Centres throughout the County.	Q4 2015.
6. LCC will consider the creation of an opportunity for an international artist to work in Leitrim.	Supporting a sector with a distinct tradition in County Leitrim.	Artists and artistic groups in Leitrim.	Q3 2015.
7. LCC will facilitate information sharing at local, regional, national and international levels throughout networking opportunities and strategies for the creative sector	Supporting a sector with a distinct tradition in County Leitrim.	Artists and artistic groups in Leitrim, business support agencies, Leitrim LEO.	Q3 2015.

Energy Supply & Green Economy

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. LCC will ensure that energy supply/infrastructure can meet any inward investment opportunities.	Supporting infrastructure to help transform/regenerate the local economy of Leitrim	DCENR	From Q4 2015.
2. LCC will facilitate the development of a group of relevant partners to develop renewable energies in Leitrim	Supporting soft/intellectual infrastructure to help develop renewable energies in Leitrim	Leitrim LEO, EI, SEAI, renewable energy firms, DCENR.	From Q3 2015.
3. LCC will consider sustainable development proposals in the County, subject to community engagement and buy-in.	Facilitating sustainable development of local communities in the County.	Rural Development Scheme/LEADER.	From Q4 2015.
4. LCC will encourage the development and diffusion of innovative energy efficiency models among public as well as private sector employers in the county.	Supporting the dissemination and benefits of low carbon energies, which are also cost-effective.	LCC as exemplar and supporting dissemination of benefits.	From Q4 2015.
5. LCC will seek to learn about and disseminate best practices of sustainable energy zones in other urban settings in Ireland and internationally.	Further supporting the dissemination and benefits of low carbon energies, which are also cost-effective.	LCC in tandem with other local authorities and possibly through consideration of EU funding programmes (Irish Office, Brussels).	From Q1 2016.

County Leitrim Economic Development Strategy

6. <i>LCC will identify opportunities to develop exemplar energy efficiency technologies in Leitrim.</i>	Supporting the dissemination and benefits of low carbon energies, which are also cost-effective.	Leitrim LEO, EI, SEAI, renewable energy firms, DCENR.	From Q3 2015.
7. <i>LCC will encourage inward investment in wind energy and renewable energies in Leitrim, in partnership with the IDA and EI.</i>	Facilitating novel forms of inward investment compatible with the comparative strengths of Leitrim.	IDA, EI (as part of the overall set of actions to promote inward investment in the County).	From Q2 2015.
8. <i>In partnership with EI, LCC will support opportunities for enterprise development and expansion of innovating companies involved in developing and supporting eco-construction.</i>	Contributing to a low carbon and more sustainable local built environment.	EI and the SEAI.	From Q4 2015.
9. <i>LCC will facilitate meeting the needs for growth of renewable energies through training programmes and skills development locally.</i>	Supporting the growth and development of renewable energy in the County among enterprises and renewables firms.	Leitrim LEO, EI, SEAI, renewable energy firms.	From Q3 2015.

Retail, Town Centre & Services

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. <i>LCC will work towards the overall goal of having a competitive mix of town centre and out-of-town retailing.</i>	Facilitating attractive and sustainable local retailing and the wider supply chain.	Local chambers, business groups and consumers.	From Q3 2015.
2. <i>LCC will ensure the provision of supporting infrastructure and services to facilitate retail footfall in town centres as well as out-of-town.</i>	To help ensure balance retail development and preserving local retailers.	Local chambers, business groups and consumers.	From Q3 2015.
3. <i>Ultimately the performance of retailing and town centres in Leitrim, as with other towns and villages in the country, will depend to a large extent on enterprise growth in the county – small businesses, larger enterprises and FDI.</i>	Broadening and diversifying the mix of economic activities in the County through promotion of FDI and indigenous enterprise development – see Actions above.	IDA, EI, Leitrim LEO and other national agencies with an input into enterprise development (e.g. SEAI).	From Q2 2015.
4. <i>LCC will encourage the presence of active business groups in each town.</i>	Facilitating attractive and sustainable local businesses and the wider supply chain.	Local chambers, business groups and consumers.	From Q3 2015.
5. <i>LCC will develop an incentive scheme to encourage new businesses into town centres.</i>	Facilitating town centre development and vibrancy, and promoting greater retailing choice for shoppers.	Local chambers, business groups and consumers.	From Q3 2015.
6. <i>LCC will examine the opportunity for artists to be based in vacant buildings at nominal rent</i>	Promoting use of vacant town centre buildings and the development of the creative sector	Artists and local keyholders/landlords	From Q1 2016.
7. <i>LCC will encourage the development of an app for main towns in County</i>	Town centre development	Possibly through competition	From Q1 2016.

Education, Training & Skills

Sector Specific Action	SEDO	Stakeholder Partners	Timing
1. LCC will liaise with the local Educational and Training Board and third-level institutions to raise the importance of enhancing educational attainment across the county in support of economic development.	Enhancing educational performance in knowledge-oriented activities to ensure sustainable economic development within the County and its region.	Leitrim LETB, local schools and training organisations.	From Q3 2015.
2. LCC will facilitate the development of an information resource to provide sight of the education and skills training demands of businesses within the County and matching these with available courses within the County and region.	Matching skills supply with skills needs.	Local employers, chambers and business groups, Leitrim LETB, schools and training organisations. Possibility of LCC initiating a periodic survey of local business needs from 2016.	From Q1 2016.
3. LCC will engender pride and ambition among school going children, particularly towards Junior and Leaving Certificate, and the wider community for the entrepreneurial and business successes of the County through a 'Business Heros' campaign utilising photographs of Leitrim 'Business Heros' in hotels, County Council offices and public buildings throughout the county.	Inculcating knowledge in entrepreneurship among school children as the basis of long-term enterprise development.	Local employers, chambers and business groups, Leitrim LETB, schools and training organisations. Possibility of LCC leading on a campaign to have high profile business leaders to visit local schools during 2016.	From Q1 2016.
4. LCC will examine the development of a Schools Fifth Year competition for a business development project employing the application of STEM (Science, Technology, Engineering and Mathematics) skills to either a start-up or existing business in the County.	Making pupils aware of the importance of STEM and career options in STEM and/or the wide range of careers now making use of STEM (e.g. digital content).	Local employers, chambers and business groups, Leitrim LETB, schools and training organisations. Possibility of LCC rolling out a specific campaign with high profile people in the STEM area during 2016.	From Q2 2016.
5. Maintain the linkages between college students and their home areas through college placements	Skills training and development, retention of graduates in their home county after graduation	HEIs in the region (NUIG, Sligo IT, lyit, Athlone IT, GMIT etc.)	From Q2 2016.

Implementation and Monitoring

The Leitrim County Council Executive and the Strategic Policy Committee for Economic Development will assume the lead roles in implementing the Economic Strategy, supported with advisory inputs from the High Level Advisory Group. In addition, Leitrim County Council economic development personnel, including the leadership of the Leitrim Local Enterprise Office, will provide research support to this Economic Strategy.

The plan to implement the Economic Strategy is shown schematically below, which also references internal and external audiences.

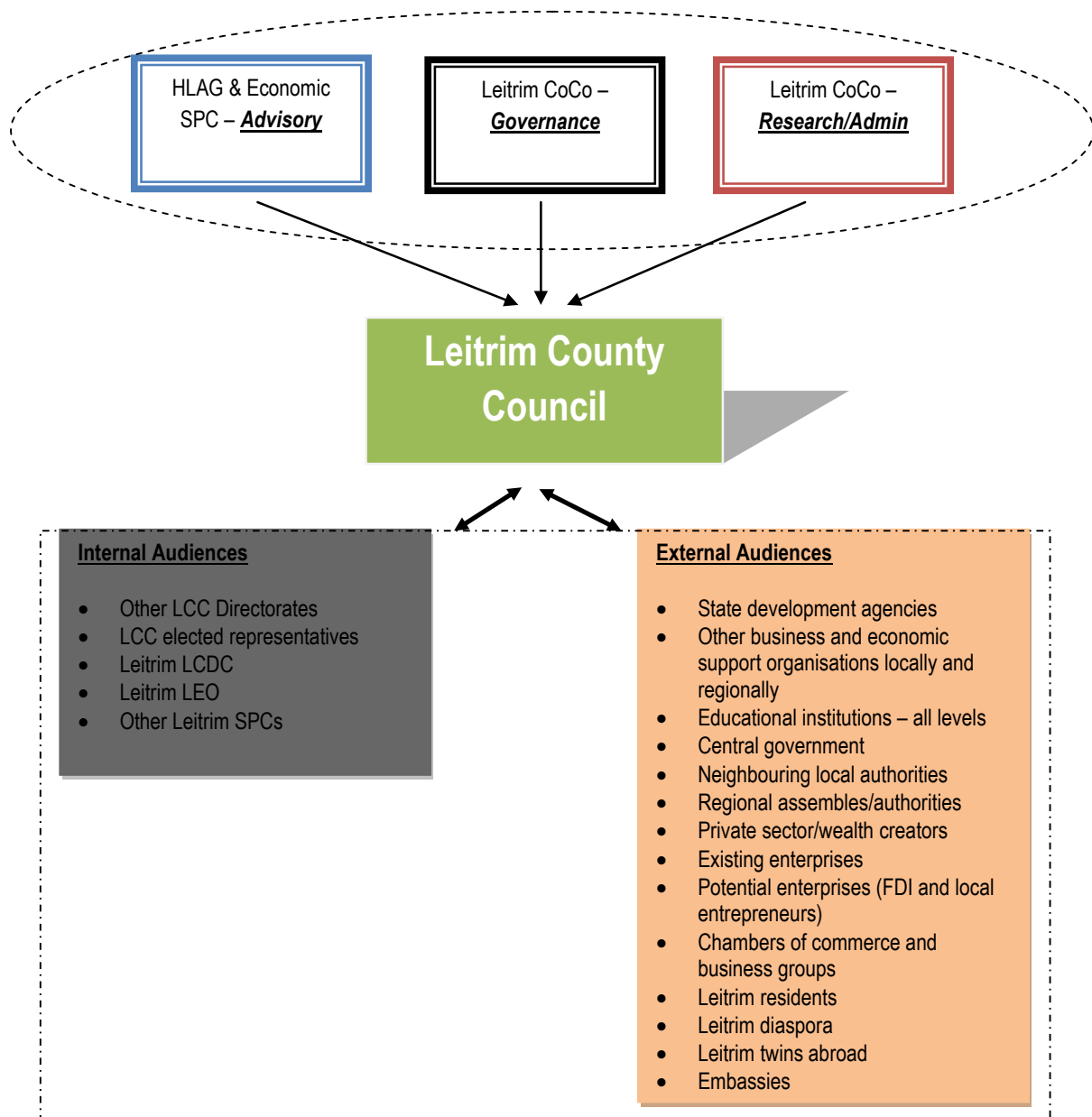
Success factors for the Economic Strategy include the following:

- Projections for economic and employment growth being achieved
- Strong and positive sectoral shifts towards knowledge-intensive employment
- Delivery of IDA/FDI employment envisaged
- Leitrim County Council fostering cooperation and support of the key enterprise development agencies
- The response of the private sector to the development opportunities highlighted in the Economic Strategy
- The adoption of the Economic Strategy by Leitrim County Council and its embrace by local partners

The *main risks* associated with the Strategy are the following:

- *Macroeconomic risks* - whereby the national economy performs less strongly than projected
- *FDI* – Ireland's position as one of the leading host countries for inward investment deteriorates, due to increased competition from lower cost or neighbouring countries
- *Competitive* – other locations within Ireland will compete more vigorously for FDI
- *Bureaucracy* – proposed actions become delayed due to administrative hold-ups or a loss of focus

The support of key internal and external audiences is crucial. Leitrim County Council will engage with its partners on an ongoing basis throughout the planning period (2015-2021) in the implementation of the Economic Strategy.



Key Performance Indicators

Monitoring the implementation of the Strategy will take two forms: firstly, ensuring that agreed actions are being executed effectively; and, secondly, that the intended outcomes of Strategy are occurring.

Selected Key Performance Indicators (KPIs) can be used to monitor performance throughout the period of the Strategy and County Development Plan. Priority will be given to indicators for which independent data is available with an emphasis put on employment generation and retention. KPIs can be grouped under five priorities, namely:

- FDI – this can be assessed annually with relevant data
- Indigenous enterprise development – this can also be assessed annually
- Entrepreneurship – this can be assessed annually with Local Enterprise Office and Enterprise Ireland data (progression)
- Tourism – this can be assessed annually with Fáilte Ireland data
- The Leitrim labour market – this can be assessed in 2017 and 2022 (following the next Censuses).

Key Business Supports – Nationally, Regionally and Locally

Enterprise Supports	
IDA	Responsible for the attraction and development of foreign direct investment in Ireland http://www.idaireland.com/
Enterprise Ireland	Provides a range of funding supports and programmes for established SMEs in the manufacturing and internationally traded services sector. An established SME is one with an established trading record, employs between 10 and 250 employees, and has either annual turnover of less than €50m or an annual balance sheet of less than €43m. There are a range of supports available under the following categories: <ul style="list-style-type: none"> • Market Research and Internationalisation Supports • In-Company & Collaborative Research & Development Supports • Supports to Enhance and Develop your Management Team • Productivity and Business Process Improvement Supports • Company Expansion Packages More information on the range of programmes available can be found at http://www.enterprise-ireland.com/en/funding-supports/Company/Esetablish-SME-Funding
Community Enterprise Centres	Community Enterprise Centres are supported by Enterprise Ireland and exist to help the development of entrepreneurship in their areas. There are 11 centres in Leitrim: <ul style="list-style-type: none"> • Drumshanbo Enterprise & Technology Centre • Drumshanbo Food Centre ('Food Hub') • Carrick on Shannon Business Park ('The Hive') • The Market Yard Centre • Mohill Enterprise Centre • Drumkeerin Enterprise Centre • Ballinamore Enterprise Centre • Manorhamilton Enterprise Centre • Ballinamore & Ballyconnell Enterprise Centre • Keshcarrigan Enterprise Centre • Manorhamilton Enterprise Forum
Leitrim Local Enterprise Office	Located in Carrick-on-Shannon, the Office offers a range of supports for individuals looking to start or grow a business. The Leitrim LEO can provide advice and training, as well as a number of financial supports: <ul style="list-style-type: none"> • Feasibility grants to assist in the research of market demand for a product or service. The maximum grant payable must not exceed 60% of the investment or €20,000 whichever is lesser. • Priming grants are available to micro enterprises within the first 18 months of starting up. The maximum available grant must not exceed 50% of the investment or €150,000, whichever is the lesser, and can be used for capital items, operating expenditure, marketing, consultancy or business

	<p>specific training.</p> <ul style="list-style-type: none"> • Microfinance loans which provide unsecured loans from €2,000 to €25,000 to fund the start-up of a business where the applicant has been refused credit from a commercial institution. Terms are from 3 to 5 years, paid at an interest rate of 7.5%. • Business Expansion Grants are available to businesses that employ up to 10 people and are either trading or have the potential to trade internationally. The maximum grant payable must not exceed 50% of the investment or €150,000 whichever is the lesser. <p>https://www.localenterprise.ie/Leitrim/Financial-Supports/</p>
<p>Western Development Commission</p>	<p>Operates a number of funds that provide loans and equity to business and local communities in the West:</p> <ul style="list-style-type: none"> • A Venture Capital Business Fund which provides loans and equity to high growth enterprises • The Strategic Investment Fund which targets flagship projects that would have a major impact on the region • The Local Investment Fund provides loans to community enterprise groups • WDC Micro-Loan Fund: Creative Industries has allocated €1,000,000 over three years to the creative industries sector. The loans range from €5,000 to €25,000, and are available to businesses in the creative industries sector for growing and developing their business. <p>http://www.wdc.ie/</p>
<p>Carrick-on-Shannon Chamber of Commerce</p>	<p>Lobby both regionally and nationally on behalf of members, and provide networking events and advertising on behalf of members.</p> <p>http://www.carrickonshannon.ie/about_carrick_chamber/benefits-of-joining.html</p>
<p>Irish Small and Medium Enterprises Association</p>	<p>Provides advice and support to its members, along with promoting its businesses and holding networking events. Joining also entitles a business to discounts on different types of insurance and certain training.</p> <p>http://isme.ie/</p>
<p>National Pension Reserve Fund (NPRF) Backed Schemes</p>	<ul style="list-style-type: none"> • Innovation Fund Ireland: Joint initiative between Enterprise Ireland and the NPRF, which provides funding aiming to attract leading venture capital fund managers to Ireland to set up venture capital management operations http://www.nprf.ie/Investments/InnovationFundIreland.htm • The NPRF has developed a range of support funds for the SME sector to provide equity, credit and recovery investment <ul style="list-style-type: none"> ○ BlueBay Ireland is a €450m credit fund that will provide loans to larger SMEs and mid-sized businesses in Ireland. Loan amounts range from €5 million to €45 million. ○ Carlyle Cardinal Ireland is a €350 million private equity fund that will focus on investing in healthy

	<p>businesses seeking to grow</p> <ul style="list-style-type: none"> ○ Better Capital Ireland is a €100 million private equity fund that will invest in underperforming businesses which are at or close to the point of insolvency but have the potential for financial and operational restructuring. <p>http://www.nprf.ie/SMEFunds/SMEFunds.htm</p>
<p>Action Plan for Jobs</p>	<p>The website provides information on many different supports that are available for Irish start-ups and small businesses, as well as the “supporting SMEs Online Tool” which by answering a small number of questions, allows companies to find out which supports are available to them.</p> <p>http://www.actionplanforjobs.ie/</p>
<p>Department of Jobs, Enterprise and Innovation</p>	<ul style="list-style-type: none"> • SME Credit Guarantee Scheme: the purpose of this scheme is to encourage additional lending to SMEs, where they are unable to access credit due to inadequate collateral or an inadequate understanding of the novelty of a business model. Customers must have been declined a loan by a lender before eligibility for the scheme can be considered, and the lender must decide the applicant is eligible for the scheme. The scheme provides lenders with a State Guarantee for 75% of the value of the loan. http://www.djei.ie/enterprise/smes/creditguarantee.htm • Microfinance Ireland: Provides unsecured loans from €2,000 to €25,000 to fund the start-up of a business where the applicant has been refused credit from a commercial institution. These loans are available through the Leitrim Local Enterprise Office. http://microfinanceireland.ie/
<p>Intreo</p>	<p>Intreo provides a wide range of supports and services to both jobseekers and employers. Services offered to employers include:</p> <ul style="list-style-type: none"> • Employment support and advice • JobBridge internships and work placement services • Financial supports when creating new jobs • Workplace supports to assist employees with disabilities • Advice and access to any employment initiatives of relevance to your company <p>There are Intreo Centres both in Carrick-on-Shannon and Manorhamilton. http://www.welfare.ie/en/Pages/office/Intreo-Centre-Carrick-on-Shannon.aspx</p>
<p>Skillnets</p>	<p>Business networking and training opportunities from the State/employer/trade union partnership, Skillnets. Further information available at www.skillnets.ie</p>

<p>Strategic Banking Corporation of Ireland (SBCI)</p>	<p>SBCI is a new SME funding company, which is partnering with banks and other lending organisations to provide access to flexible funding for Irish SMEs and farmers in the form of:</p> <ul style="list-style-type: none">• Flexible products with longer maturity and capital repayment options, subject to credit approval• Lower cost funding to financial institutions, which is passed on to SMEs. <p>SBCI Loans are available to most SMEs, i.e.:</p> <ul style="list-style-type: none">• Have less than 250 employees• Have a turnover of €50 Million or less (or €43 Million or less on their balance sheet)• Are independent and autonomous i.e. not part of a wider group of enterprises• Have less than 25% of their capital held by public bodies• Have a significant presence in Ireland. <p>For the agricultural sector, SMEs must also be active in at least one of the following:</p> <ul style="list-style-type: none">• Primary agricultural production• Processing agricultural products• Marketing of agricultural products. <p>Small and medium enterprises can use an SBCI Loan for working capital and investments such as:</p> <ul style="list-style-type: none">• Buying, renewing or increasing tangible assets, including machinery and buildings• Investing in intangible assets, including buying patents and licenses, the cost of designing and building a tangible asset, and R&D• Buying out a business e.g. from a retiring owner or to create new management• Refinancing loans held with certain banks leaving the Irish market (subject to that bank's acceptance). <p>There are some exclusions.</p> <p>Agricultural Sector</p> <p>SBCI-supported loans are available to agricultural customers for investment only. There are certain exclusions specific to the agricultural sector, such as:</p> <ul style="list-style-type: none">• Working capital• Purchase of animals <p>AIB SBCI Loans are available at 4.5% per annum variable. This is 2% lower than its Standard Variable Business Rate of 6.5%.</p> <p>An SBCI Loan is available for any term between two and 10 years.</p> <p>An SBCI Loan is available for amounts up to €5m.</p> <p>For more information, go to http://business.aib.ie/products/finance-and-loans/sbci-loan</p>
--------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Technical Annex of Supplementary Data and Information

Box A1: Upper Shannon Erne Future Economy (USEFE)

The Upper Shannon Erne Future Economy (USEFE) Project began in 2013 with the coming together of business people from the counties of Leitrim, Roscommon, Longford and Cavan led by Bord na Móna and with the support of Leitrim County Council. The purpose of this initiative is to develop a vision for how the region can be developed, led by the actions of the people who already have businesses in the area. Arising out of a number of workshops, different sectoral teams emerged in the following areas:

- Food
- Creative sector
- Manufacturing
- Services and Diaspora Group
- Forestry and Energy
- Tourism.

The sectoral teams had two roles:

- Developing networking opportunities to create synergies and learning and new business opportunities
- Developing projects within their group.

To date approximately 90 businesses have participated, either in attendance at plenary events or within the sectoral teams.

The other achievements of the USEFE Project to date are:

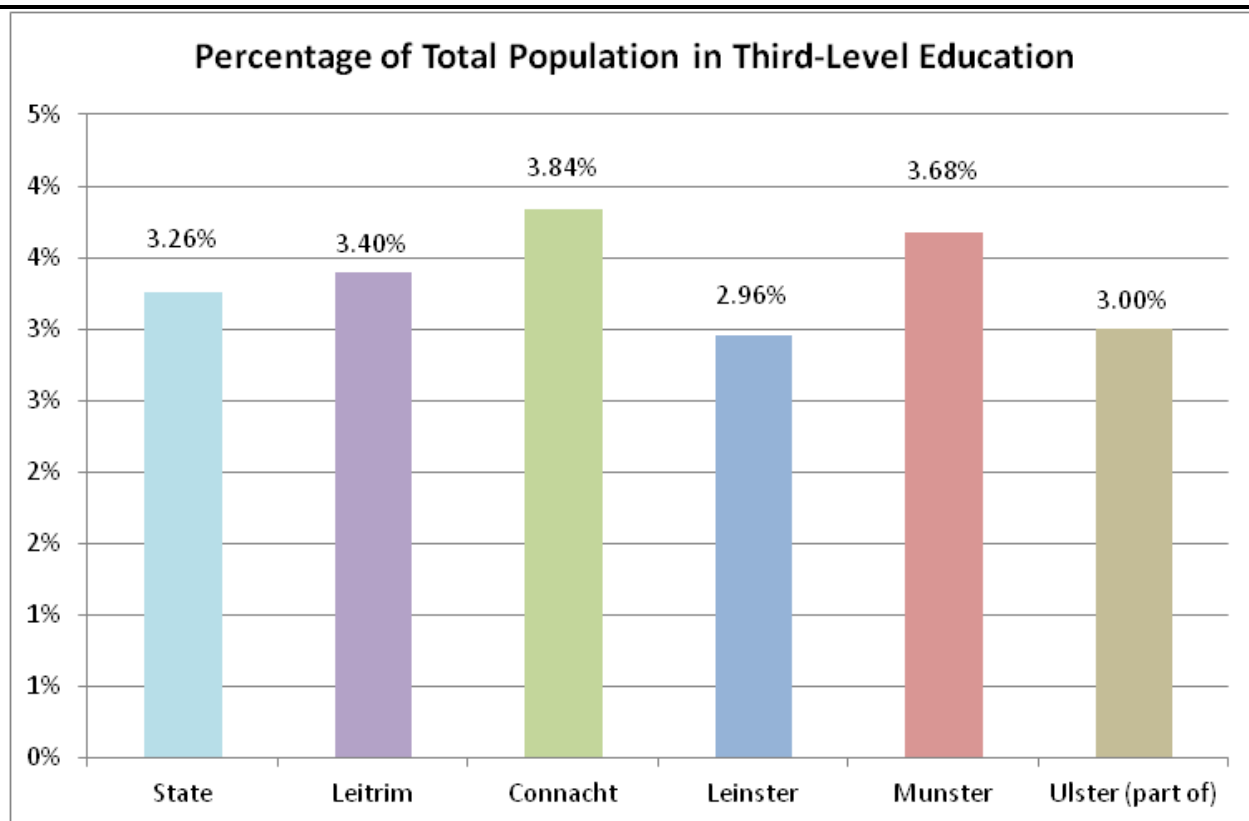
- The Tourism Trade Groups liaising with key agencies encouraged a renewed focus on the Shannon Erne system in advance of its twenty year anniversary.
- The Services and Diaspora group who worked with Connect Ireland and the GAA County Committees to hold a regional event aimed at highlighting the potential of the Connect Ireland initiative through ex-GAA players and families who are now abroad. The event also involved ten companies actively recruiting for over 300 jobs in the region.
- The Creative Group who focused on identifying priorities for the region and secured agreement from a diverse group on four initiatives around film, use of vacant workspace, international trade opportunities and networking including continued professional development.
- The Forestry and Energy group developed an excellent example of how a full supply chain can be harnessed in this case in relation to wood chips. The group included the grower, the harvester, the haulier and the end user. This process resulted in sales within the group and the development of a potential solution to the harvesting of small scale plantations.
- The Manufacturing Group developed an audit of skills amongst the diaspora both in Ireland and abroad using the LinkedIn social media tool.
- The Food Group brought together businesses of varying sizes within the sector which resulted in identifying an opportunity for mentoring, an idea which will be brought to all sectors in Phase II of the USEFE Project.

Phase II is now commencing and is expected to operate initially over a 2-year period with six financial partners (i.e. local authorities (4), ESB and Bord na Móna). The objectives that have been identified to date are:

- Proactively assist regional economic development through the engagement of key businesses and regional stakeholders in order to identify advantages, synergies and opportunities for this particular region.
- Facilitate existing and develop new sectoral groups to deliver on the advantages, synergies and opportunities for the region through networking, shared resources, economies of scale, cross sectoral engagement and individual projects.
- Promote the region internally and externally in order to maximize the region's economic potential based on its key advantages, capacities and opportunities and through active engagement with wider economic initiatives and funding opportunities.
- Foster an even stronger spirit of entrepreneurship in the USEFE region by sharing knowledge, experience and expertise between the various participating businesses.
- Ensure that there is an effective and co-ordinated executive support system in place to maximize the potential of the initiative, and to secure further participation of businesses across the region.

Source: Leitrim County Council.

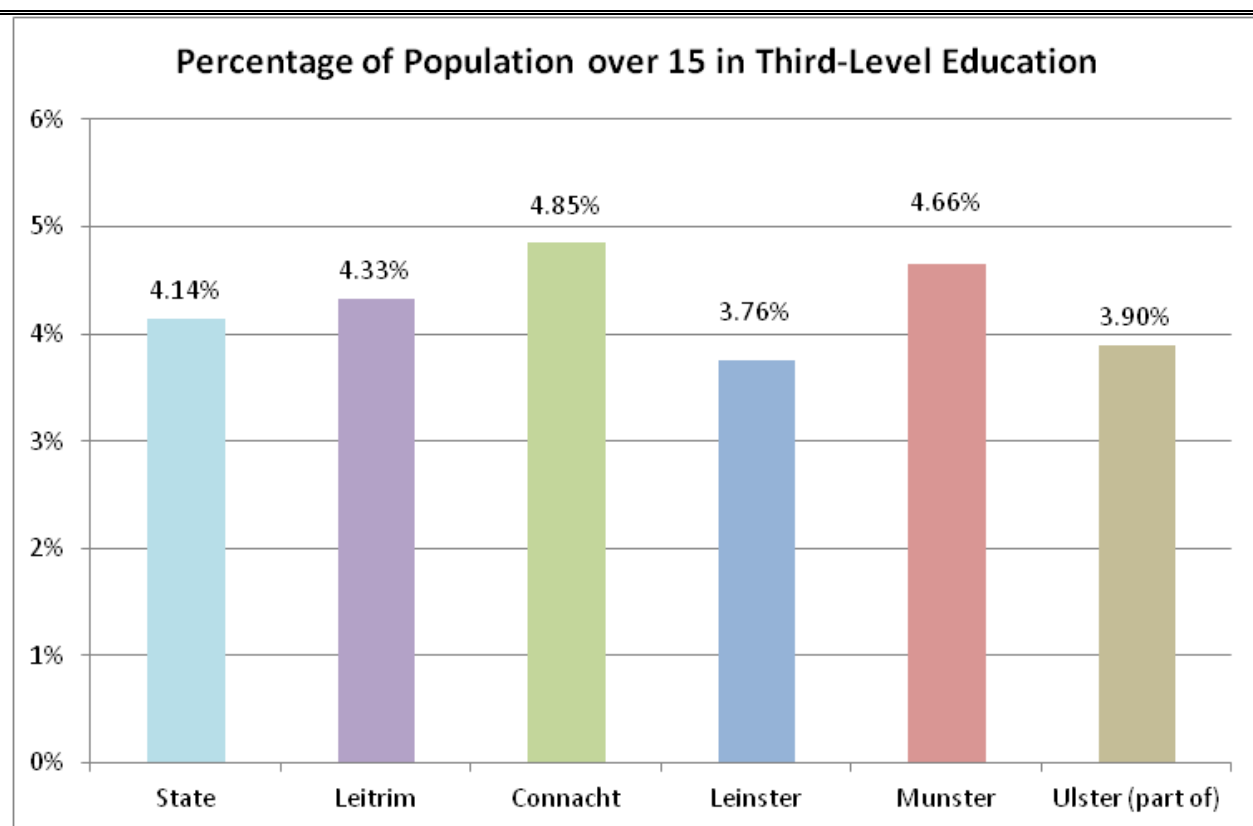
Figure A1: County of Permanent Residence of Irish-Domiciled Full-Time Students in all Higher Education Authority (HEA)-Funded Institutions (2012/2013) – Proportion of Total Population



Source: HEA data, FTI-PMCA Consulting analysis on behalf of Leitrim County Council.

Note: Connacht consists of Counties Galway, Mayo, Roscommon and Sligo as well as Leitrim; Leinster consists of Counties Carlow, Dublin (City and County), Kildare, Kilkenny, Laois, Longford, Louth, Meath, Offaly, Westmeath, Wexford and Wicklow; Munster of Counties Clare, Cork, Kerry, Limerick, Tipperary and Waterford; and Ulster (part of) of Counties Cavan, Donegal and Monaghan. Note also that the higher education institutions covered in the data include the universities, colleges (e.g. teacher education colleges) and the institutes of technology.

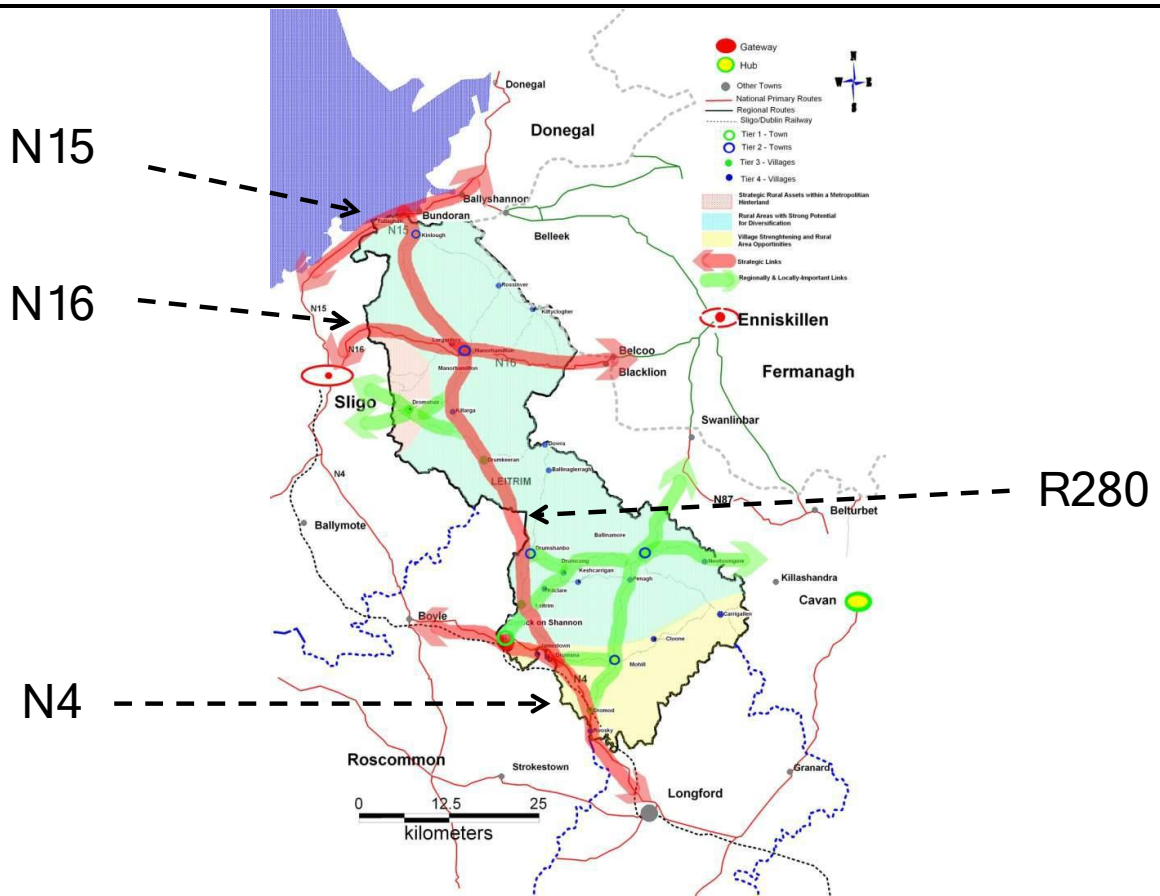
Figure A2: County of Permanent Residence of Irish-Domiciled Full-Time Students in all Higher Education Authority (HEA)-Funded Institutions (2012/2013) – Proportion of Population Aged 15 Years and Above



Source: HEA data, FTI-PMCA Consulting analysis on behalf of Leitrim County Council.

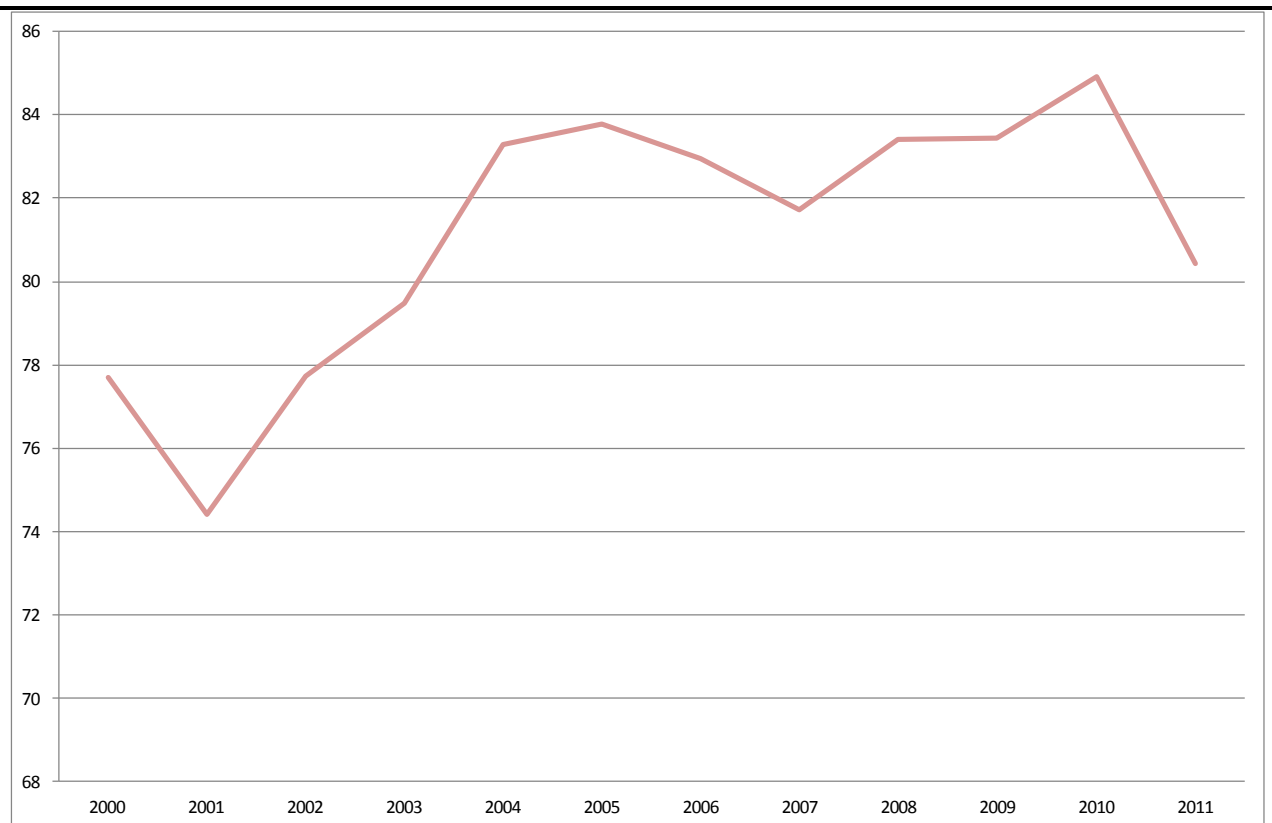
Note: Connacht consists of Counties Galway, Mayo, Roscommon and Sligo as well as Leitrim; Leinster consists of Counties Carlow, Dublin (City and County), Kildare, Kilkenny, Laois, Longford, Louth, Meath, Offaly, Westmeath, Wexford and Wicklow; Munster of Counties Clare, Cork, Kerry, Limerick, Tipperary and Waterford; and Ulster (part of) of Counties Cavan, Donegal and Monaghan. Note also that the higher education institutions covered in the data include the universities, colleges (e.g. teacher education colleges) and the institutes of technology.

Figure A3: Strategic, Regionally and Locally Important Links relating to Leitrim (2015-2021)



Source: Leitrim CDP 2015-2021, road labels added by FTI-PMCA Consulting.

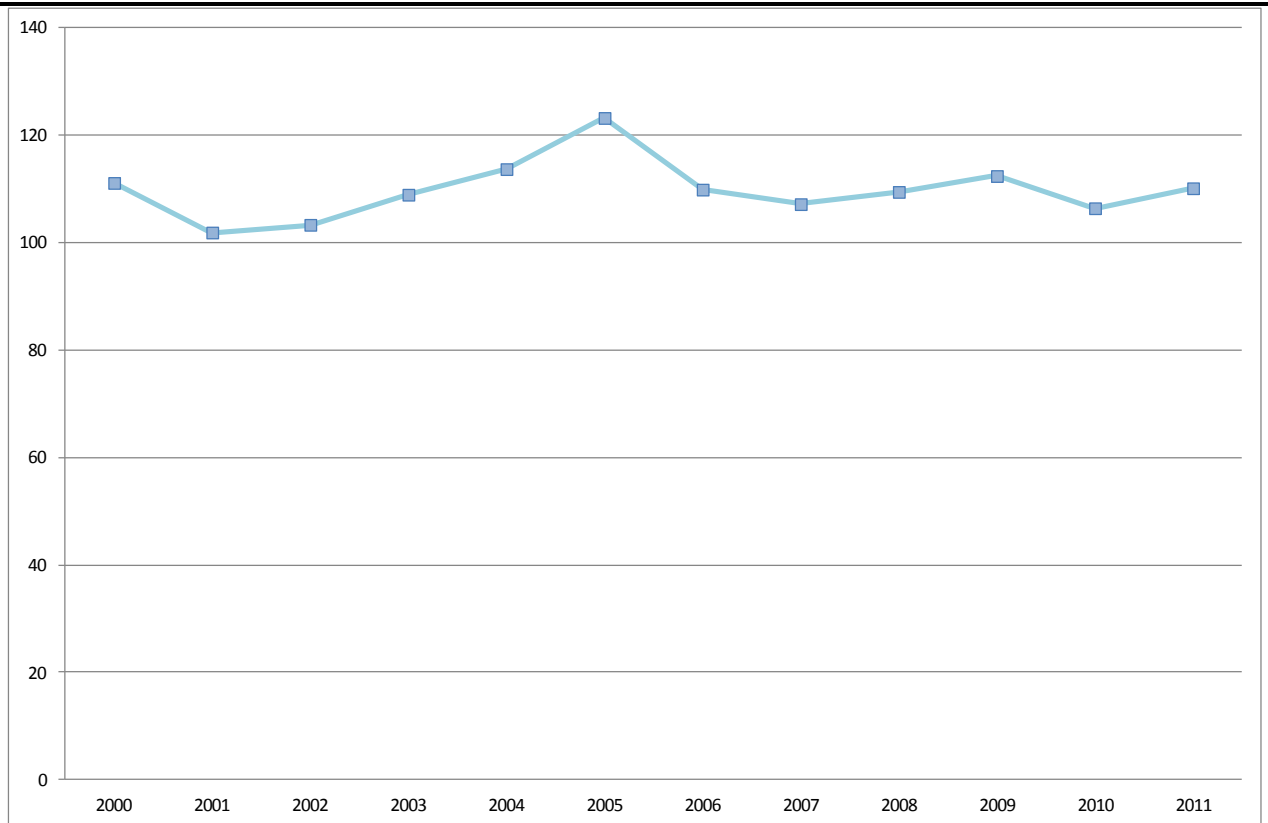
Figure A4: Primary Income per Head in County Leitrim (2000-2011) (State=100 Each Year)



Source: CSO data, FTI-PMCA Consulting analysis on behalf of Leitrim County Council.

Note: Primary income is income before taxes and social welfare transfers, and represents a more fundamental measure of income performance than disposable income.

Figure A5: Self-Employed Income per Head in County Leitrim (2000-2011) (State=100 Each Year)



Source: CSO data, FTI-PMCA Consulting analysis on behalf of Leitrim County Council.

Note: Self-employed income is a component of primary income.

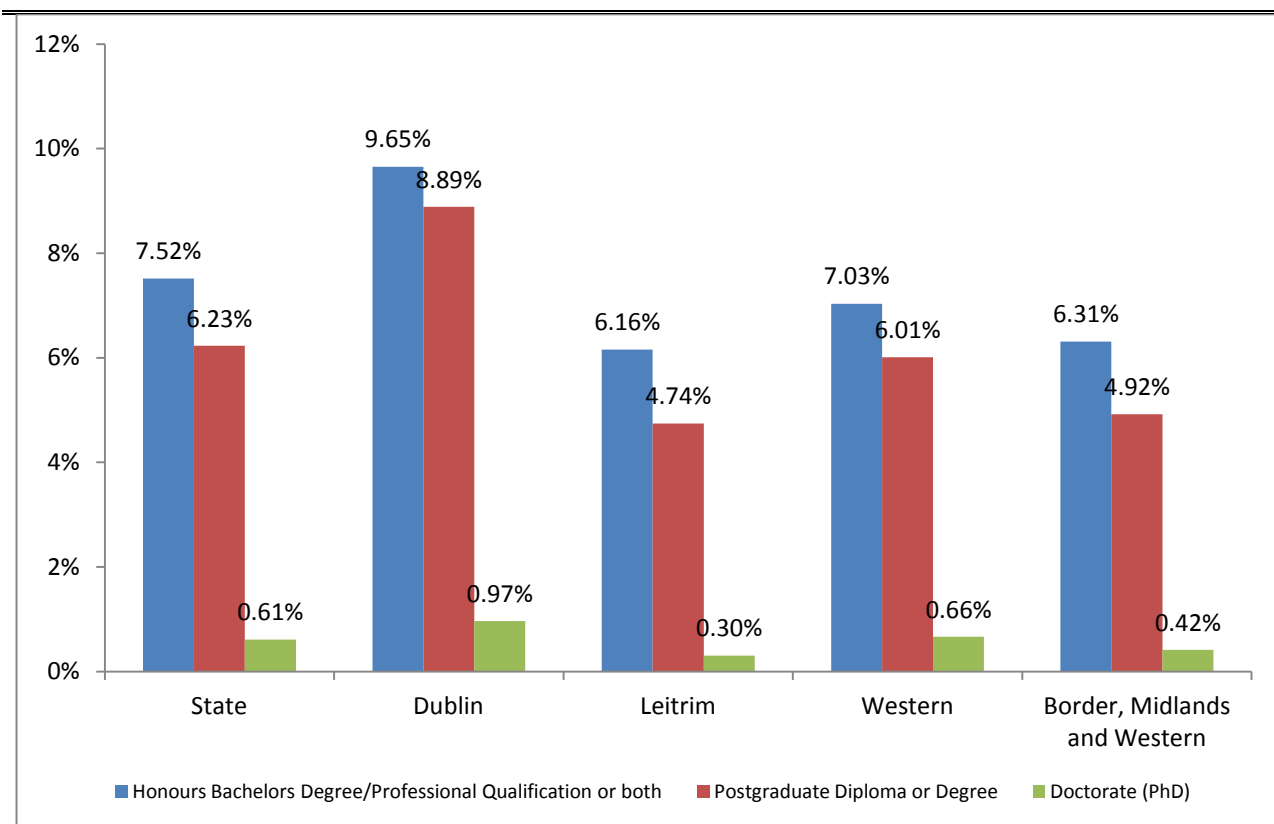
Figure A6: Residents Aged 15 Years and Above in County Leitrim and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications as a Proportion of All Residents Aged 15 Years and Above in Each Location (2011) – All Subject Areas



Source: CSO Census 2011 data, FTI-PMCA consulting analysis on behalf of Leitrim County Council.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. Western counties are Mayo, Galway and Roscommon. Border counties are Donegal, Sligo, Leitrim, Cavan, Monaghan and Louth. Midland counties are Laois, Offaly, Longford and Westmeath.

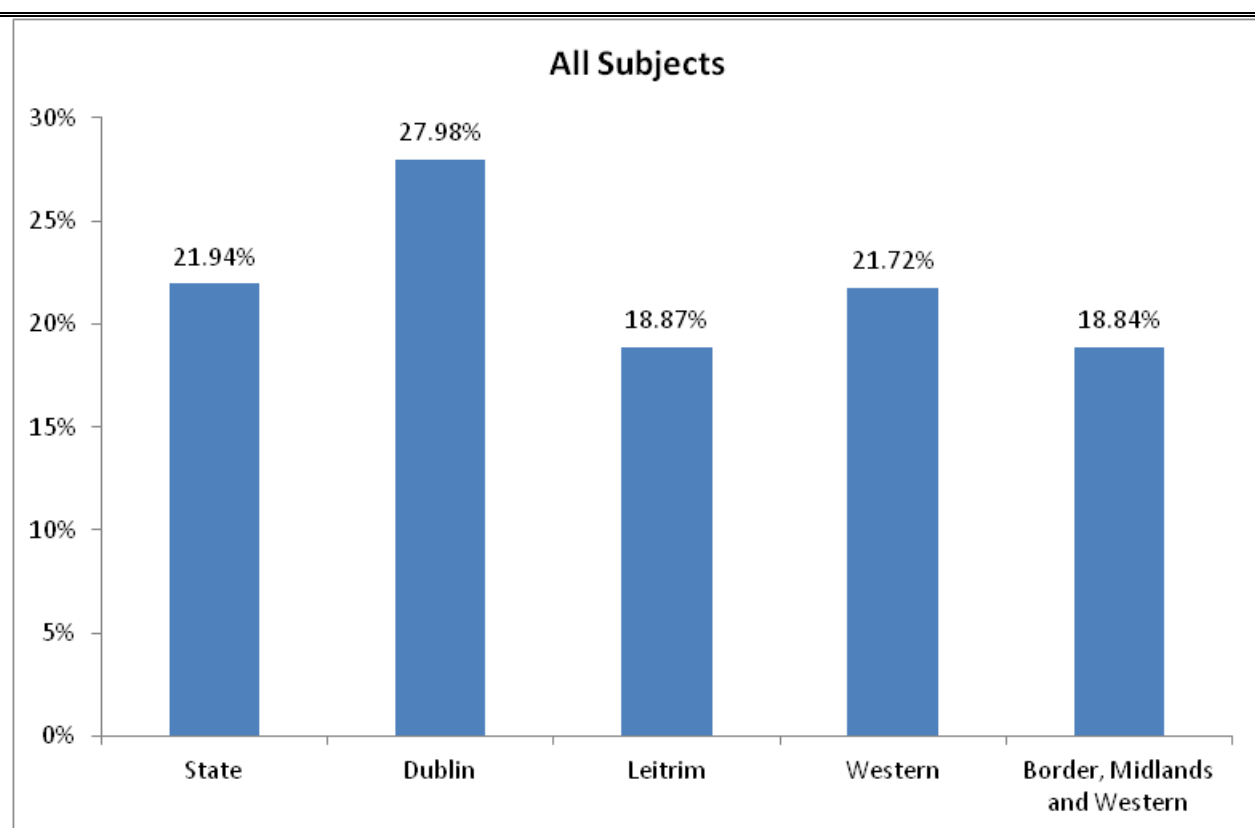
Figure A7: Residents Aged 15 Years and Above in County Leitrim and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications as a Proportion of All Residents Aged 15 Years and Above in Each Location (2011) – Level of Third-Level Qualifications



Source: CSO Census 2011 data, FTI-PMCA consulting analysis on behalf of Leitrim County Council.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. Western counties are Mayo, Galway and Roscommon. Border counties are Donegal, Sligo, Leitrim, Cavan, Monaghan and Louth. Midland counties are Laois, Offaly, Longford and Westmeath.

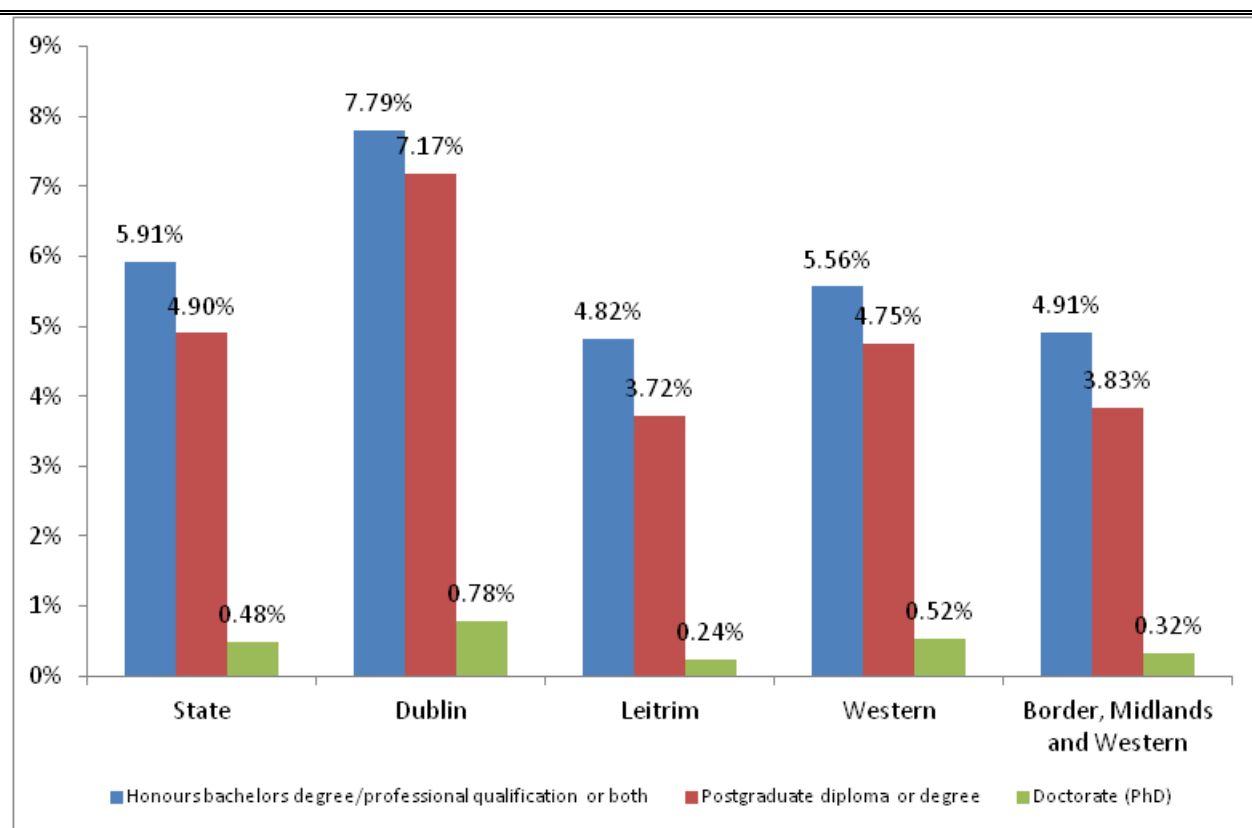
Figure A8: Residents Aged 15 Years and Above in County Leitrim and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications as a Proportion of All Residents in Each Location (2011) – All Subject Areas



Source: CSO Census 2011 data, FTI-PMCA consulting analysis on behalf of Leitrim County Council.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. Western counties are Mayo, Galway and Roscommon. Border counties are Donegal, Sligo, Leitrim, Cavan, Monaghan and Louth. Midland counties are Laois, Offaly, Longford and Westmeath.

Figure A9: Residents Aged 15 Years and Above in County Leitrim and Selected Other Parts of Ireland with Third-Level or Higher Educational Qualifications as a Proportion of All Residents in Each Location (2011) – Level of Third-Level Qualifications



Source: CSO Census 2011 data, FTI-PMCA consulting analysis on behalf of Leitrim County Council.

Note: Population aged 15 years and above with third-level or higher educational attainment relative to all residents aged 15+ years in each location. Western counties are Mayo, Galway and Roscommon. Border counties are Donegal, Sligo, Leitrim, Cavan, Monaghan and Louth. Midland counties are Laois, Offaly, Longford and Westmeath.

Table A1: Baseline Employment in County Leitrim (2011) – Persons Employed and Comparative Outbound Commuting

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813

**Outbound commuter rate
40.5%**

**Leitrim 12th highest
outbound
commuting rate of
all counties in that
year**

- Comparative Outbound Commuter Rates (2011)**
- > 50% South Dublin (Max 57%), Fingal, DLR, Meath (54%)
 - 44% Roscommon
 - 25-30% Kilkenny, Louth, Longford, Cavan
 - 10-20% Galway City, Sligo, Donegal
 - < 10% Kerry

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs.

Table A2: Baseline Employment in County Leitrim (2011) – Details of the Destinations of the Outbound Commuters from Leitrim

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
			↓		
			Sligo	1,396	37.0%
			Longford	475	12.6%
			Cavan	424	11.2%
			Roscommon	403	10.7%
			Donegal	370	9.8%
			Dublin City	160	4.2%
			Fermanagh County	101	2.7%
			Westmeath	95	2.5%
			Mayo	42	1.1%
			Rest	305	8.1%
			Total	3,771	100.0%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs.

Table A3: Baseline Employment in County Leitrim (2011) – Details of the Source Locations of the Inbound Commuters to Leitrim

Persons Employed (2011) - CSO POWSCAR Data					
Key Economic Variable	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
		↓			
		Roscommon	1,164	46.7%	
		Sligo	520	20.9%	
		Longford	274	11.0%	
		Cavan	198	7.9%	
		Donegal	196	7.9%	
		Rest	142	5.7%	
		Total	2,494	100.0%	

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.
 Note: Fixed location jobs.

Table A4: Baseline Employment in County Leitrim (2011) – Details of the Age Distribution of People at Work in relation to Leitrim

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Age Distribution of Persons at Work					
15-19 Years	37	9	7	46	53
% Persons	0.7%	0.4%	0.2%	0.6%	0.4%
Corresponding State %	0.8%	0.8%	0.8%	0.8%	0.8%
20-44 Years	2,883	1,561	2,547	4,444	6,991
% Persons	52.0%	62.6%	67.5%	55.3%	59.2%
Corresponding State %	62.6%	62.6%	62.6%	62.6%	62.6%
45-64 Years	2,393	899	1,194	3,292	4,486
% Persons	43.1%	36.0%	31.7%	40.9%	38.0%
Corresponding State %	34.1%	34.1%	34.1%	34.1%	34.1%
65+ Years	235	25	23	260	283
% Persons	4.2%	1.0%	0.6%	3.2%	2.4%
Corresponding State %	2.5%	2.5%	2.5%	2.5%	2.5%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

The shaded cells indicate where Leitrim may be seen to be at a relative disadvantage.

Table A5: Baseline Employment in County Leitrim (2011) – Details of the Third-Level or Higher Educational Attainment of Those at Work in relation to Leitrim

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Third-Level/Higher Education of Persons at Work	1,416	916	1,663	2,332	3,995
% Persons	25.5%	36.7%	44.1%	29.0%	33.8%
Corresponding State %	38.0%	38.0%	38.0%	38.0%	38.0%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A6: Baseline Employment in County Leitrim (2011) – Details of the Socio-Economic Groups of Those at Work in relation to Leitrim (Part 1)

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Socio-Economic Groups					
Employers & Managers	721	378	554	1,099	1,653
% Persons	13.0%	15.2%	14.7%	13.7%	14.0%
Corresponding State %	15.8%	15.8%	15.8%	15.8%	15.8%
Higher Professionals	257	164	342	421	763
% Persons	4.6%	6.6%	9.1%	5.2%	6.5%
Corresponding State %	8.0%	8.0%	8.0%	8.0%	8.0%
Lower Professionals	757	476	871	1,233	2,104
% Persons	13.6%	19.1%	23.1%	15.3%	17.8%
Corresponding State %	15.5%	15.5%	15.5%	15.5%	15.5%
Non-Manual	1,752	960	1,126	2,712	3,838
% Persons	31.6%	38.5%	29.9%	33.7%	32.5%
Corresponding State %	25.9%	25.9%	25.9%	25.9%	25.9%
Manual Skilled	327	159	315	486	801
% Persons	5.9%	6.4%	8.4%	6.0%	6.8%
Corresponding State %	7.7%	7.7%	7.7%	7.7%	7.7%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A7: Baseline Employment in County Leitrim (2011) – Details of the Socio-Economic Groups of Those at Work in relation to Leitrim (Part 2)

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Socio-Economic Groups					
Semi-Skilled	523	222	345	745	1,090
% Persons	9.4%	8.9%	9.1%	9.3%	9.2%
Corresponding State %	9.4%	9.4%	9.4%	9.4%	9.4%
Unskilled	176	41	63	217	280
% Persons	3.2%	1.6%	1.7%	2.7%	2.4%
Corresponding State %	3.0%	3.0%	3.0%	3.0%	3.0%
Own Account Workers	313	33	46	346	392
% Persons	5.6%	1.3%	1.2%	4.3%	3.3%
Corresponding State %	5.2%	5.2%	5.2%	5.2%	5.2%
Farmers	580	22	39	602	641
% Persons	10.5%	0.9%	1.0%	7.5%	5.4%
Corresponding State %	4.3%	4.3%	4.3%	4.3%	4.3%
Agricultural Workers	33	8	25	41	66
% Persons	0.6%	0.3%	0.7%	0.5%	0.6%
Corresponding State %	0.6%	0.6%	0.6%	0.6%	0.6%
All Others	109	31	45	140	185
% Persons	2.0%	1.2%	1.2%	1.7%	1.6%
Corresponding State %	4.6%	4.6%	4.6%	4.6%	4.6%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A8: Baseline Employment in County Leitrim (2011) – Details of the Sectors in which Those at Work in relation to Leitrim are Active (Part 1)

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Sectors					
Agricultural, Forestry & Fishing	629	36	58	665	723
% Persons	11.3%	1.4%	1.5%	8.3%	6.1%
Corresponding State %	4.5%	4.5%	4.5%	4.5%	4.5%
Manufacturing, Mining and Quarrying, Electricity, Gas, Water Supply and Waste Management	521	310	532	831	1,363
% Persons	9.4%	12.4%	14.1%	10.3%	11.5%
Corresponding State %	12.9%	12.9%	12.9%	12.9%	12.9%
Construction	116	38	115	154	269
% Persons	2.1%	1.5%	3.0%	1.9%	2.3%
Corresponding State %	5.9%	5.9%	5.9%	5.9%	5.9%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A9: Baseline Employment in County Leitrim (2011) – Details of the Sectors in which Those at Work in relation to Leitrim are Active (Part 2)

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Sectors					
Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities	1,444	454	822	1,898	2,720
% Persons	26.0%	18.2%	21.8%	23.6%	23.0%
Corresponding State %	26.8%	26.8%	26.8%	26.8%	26.8%
Information and Communication, Financial, Real Estate, Professional, Administration and Support Service Activities	786	652	461	1,438	1,899
% Persons	14.2%	26.1%	12.2%	17.9%	16.1%
Corresponding State %	18.5%	18.5%	18.5%	18.5%	18.5%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A10: Baseline Employment in County Leitrim (2011) – Details of the Sectors in which Those at Work in relation to Leitrim are Active (Part 3)

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Sectors					
Public Administration and Defence; Compulsory Social Security	417	360	481	777	1,258
% Persons	7.5%	14.4%	12.8%	9.7%	10.6%
Corresponding State %	5.4%	5.4%	5.4%	5.4%	5.4%
Education, Human Health and Social Work Activities	1,271	560	1,133	1,831	2,964
% Persons	22.9%	22.5%	30.0%	22.8%	25.1%
Corresponding State %	20.6%	20.6%	20.6%	20.6%	20.6%
Other Service Activities	259	64	141	323	464
% Persons	4.7%	2.6%	3.7%	4.0%	3.9%
Corresponding State %	5.2%	5.2%	5.2%	5.2%	5.2%
Not Stated	105	20	28	125	153
% Persons	1.9%	0.8%	0.7%	1.6%	1.3%
Corresponding State %	0.2%	0.2%	0.2%	0.2%	0.2%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State.

Table A11: Baseline Employment in County Leitrim (2011) – Details of Those at Work in relation to Leitrim by Mode of Transport to Place of Work

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Mode of Transport to Place of Work					
Home worker	842	1	0	843	843
% Persons	15.2%	0.0%	0.0%	10.5%	7.1%
Corresponding State %	4.7%	4.7%	4.7%	4.7%	4.7%
Private Transport	4,027	2,418	3,616	6,445	10,061
% Persons	72.6%	97.0%	95.9%	80.1%	85.2%
Corresponding State %	71.8%	71.8%	71.8%	71.8%	71.8%
Public Transport	25	9	59	34	93
% Persons	0.5%	0.4%	1.6%	0.4%	0.8%
Corresponding State %	8.1%	8.1%	8.1%	8.1%	8.1%
Soft Modes	574	54	61	628	689
% Persons	10.3%	2.2%	1.6%	7.8%	5.8%
Corresponding State %	11.8%	11.8%	11.8%	11.8%	11.8%
Not Stated	80	12	35	92	127
% Persons	1.4%	0.5%	0.9%	1.1%	1.1%
Corresponding State %	3.6%	3.6%	3.6%	3.6%	3.6%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs. Boxed figures illustrate where the proportion in Leitrim is greater than that for the State. The shaded cells indicate where Leitrim may be seen to be at a relative disadvantage.

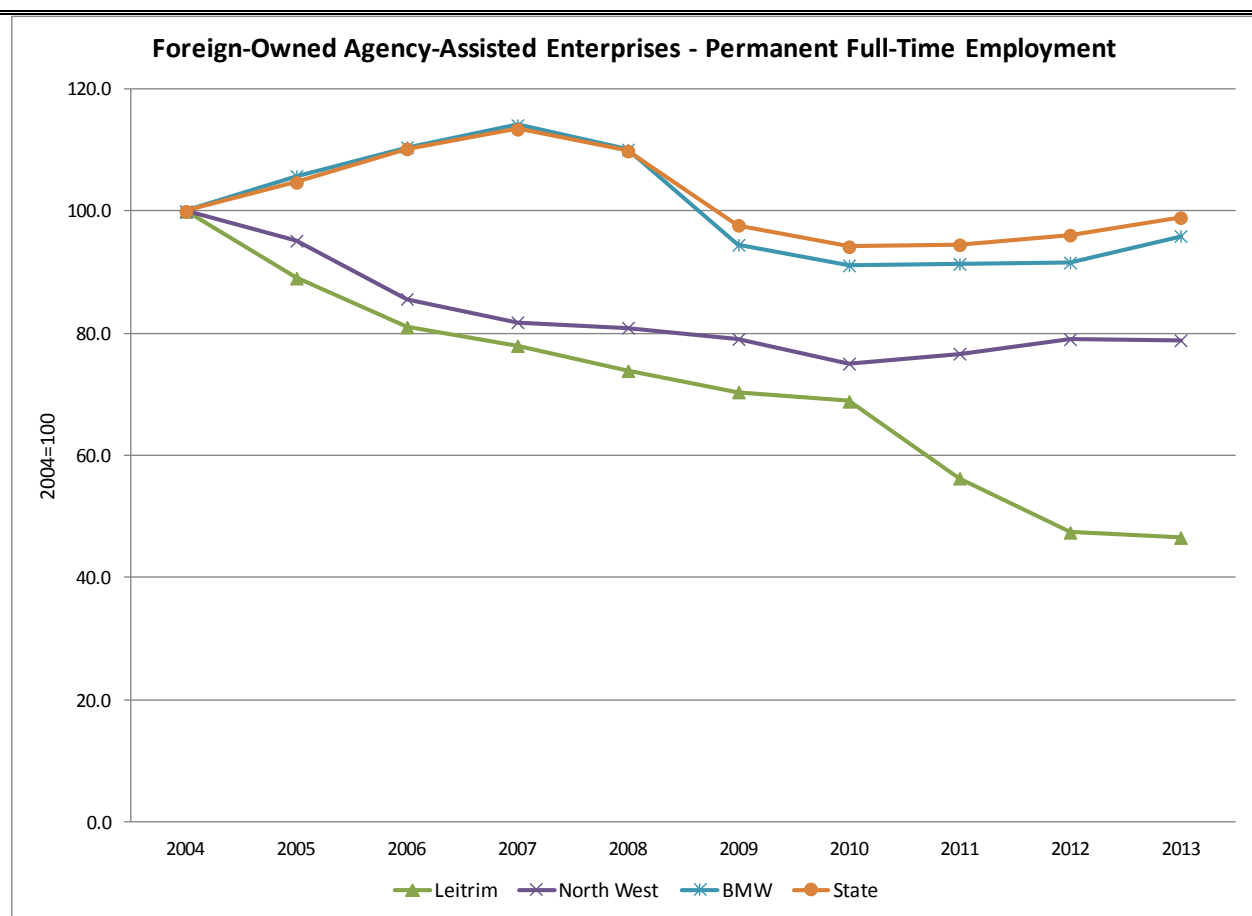
Table A12: Baseline Employment in County Leitrim (2011) – Details of Those at Work in relation to Leitrim by Selected Towns

Key Economic Variable	Persons Employed (2011) - CSO POWSCAR Data				
	Working & Living in Leitrim	Working in Leitrim and Living Elsewhere - Inbound Commuters	Living in Leitrim and Working Elsewhere - Outbound Commuters	Total Employment <i>within</i> Leitrim	Leitrim and Leitrim-Associated Total Employment
Persons at Work	5,548	2,494	3,771	8,042	11,813
Selected Towns					
Tier 1					
Carrick-on-Shannon (Leitrim Part)	1,756 31.7%	1,245 49.9%	310 8.2%	3,001 37.3%	3,311 28.0%
Tier 2A					
Manorhamilton	671 12.1%	428 17.2%	142 3.8%	1,099 13.7%	1,241 10.5%
Ballinamore	289 5.2%	58 2.3%	66 1.8%	347 4.3%	413 3.5%
Tier 2B					
Dromahair	80 1.4%	27 1.1%	213 5.6%	107 1.3%	320 2.7%
Drumshanbo	314 5.7%	74 3.0%	44 1.2%	388 4.8%	432 3.7%
Mohil	371 6.7%	74 3.0%	53 1.4%	445 5.5%	498 4.2%
Kinlough	63 1.1%	25 1.0%	243 6.4%	88 1.1%	331 2.8%
Total Selected Towns (Tiers 1, 2A and 2B)	3,544 63.9%	1,931 77.4%	1,071 28.4%	5,475 68.1%	6,546 55.4%
Rest of Leitrim	2,004 36.1%	563 22.6%	2,700 71.6%	2,567 31.9%	5,267 44.6%

Source: CSO POWSCAR (2011), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: Fixed location jobs.

Figure A10: Trend in Permanent Full-Time Employment in Foreign-Owned Agency-Assisted Enterprises in Leitrim and Selected Other Parts of the Country (2004-2013) – Index Number Format (2004=100)



Source: DJEI data, FTI-PMCA Consulting on behalf of Leitrim County Council.

Table A13: Mix of Permanent Full-Time Employment among Foreign-Owned and Irish-Owned Agency-Assisted Enterprises in Leitrim and Selected Other Parts of the Country (2004-2013)

Year	Permanent Full-Time Employment in Agency-Assisted Enterprises							
	County Leitrim		North West		BMW		State	
	Irish-Owned	Foreign-Owned	Irish-Owned	Foreign-Owned	Irish-Owned	Foreign-Owned	Irish-Owned	Foreign-Owned
2004	25%	75%	51%	49%	58%	42%	51%	49%
2007	28%	72%	59%	41%	62%	38%	53%	47%
2013	37%	63%	54%	46%	57%	43%	50%	50%

Source: DJEI data, FTI-PMCA Consulting on behalf of Leitrim County Council.

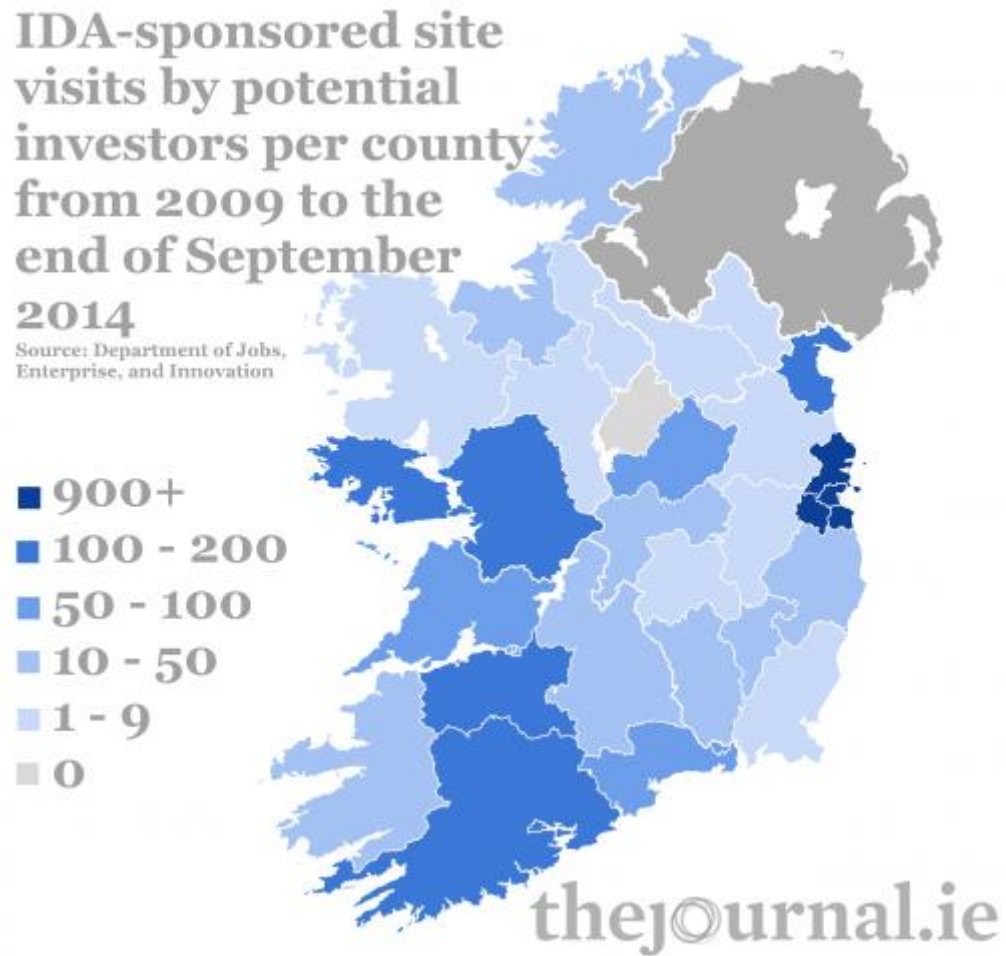
Table A14: Number of IDA Ireland Site Visits with Potential FDI Firms in Irish Counties (2009-2014)

County	IDA Ireland Site Visits with Potential Investors (2009-2014)						Total
	2009	2010	2011	2012	2013	Jan-Sept 2014	
Carlow	1	3	2	4	1	1	12
Cavan	0	3	0	3	2	1	9
Clare	9	7	15	14	5	9	59
Cork	29	44	27	38	31	26	195
Donegal	3	4	2	1	7	2	19
Dublin	90	197	150	196	180	184	997
Galway	22	41	35	18	15	16	147
Kerry	3	2	2	1	1	1	10
Kildare	1	2	3	1	1	1	9
Kilkenny	2	0	0	3	3	3	11
Laois	1	0	2	0	2	0	5
Leitrim	0	0	0	0	1	2	3
Limerick	18	38	40	30	23	21	170
Longford	0	0	0	0	0	0	0
Louth	28	25	26	12	4	10	105
Mayo	1	1	0	1	3	1	7
Meath	2	0	2	0	1	2	7
Monaghan	0	0	1	0	1	0	2
Offaly	6	7	1	3	1	0	18
Roscommon	0	0	0	0	4	0	4
Sligo	5	12	3	6	10	6	42
Tipperary	1	1	1	5	4	2	14
Waterford	8	11	11	26	14	8	78
Westmeath	14	22	15	7	9	8	75
Wexford	0	1	0	3	2	0	6
Wicklow	2	5	3	6	1	4	21
Total	246	426	341	378	326	308	2,025
Dublin % of Total	37%	46%	44%	52%	55%	60%	49%

Source: Dáil Questions (DJEI data), FTI-PMCA Consulting on behalf of Leitrim County Council.

Note: The data are maintained by IDA Ireland.

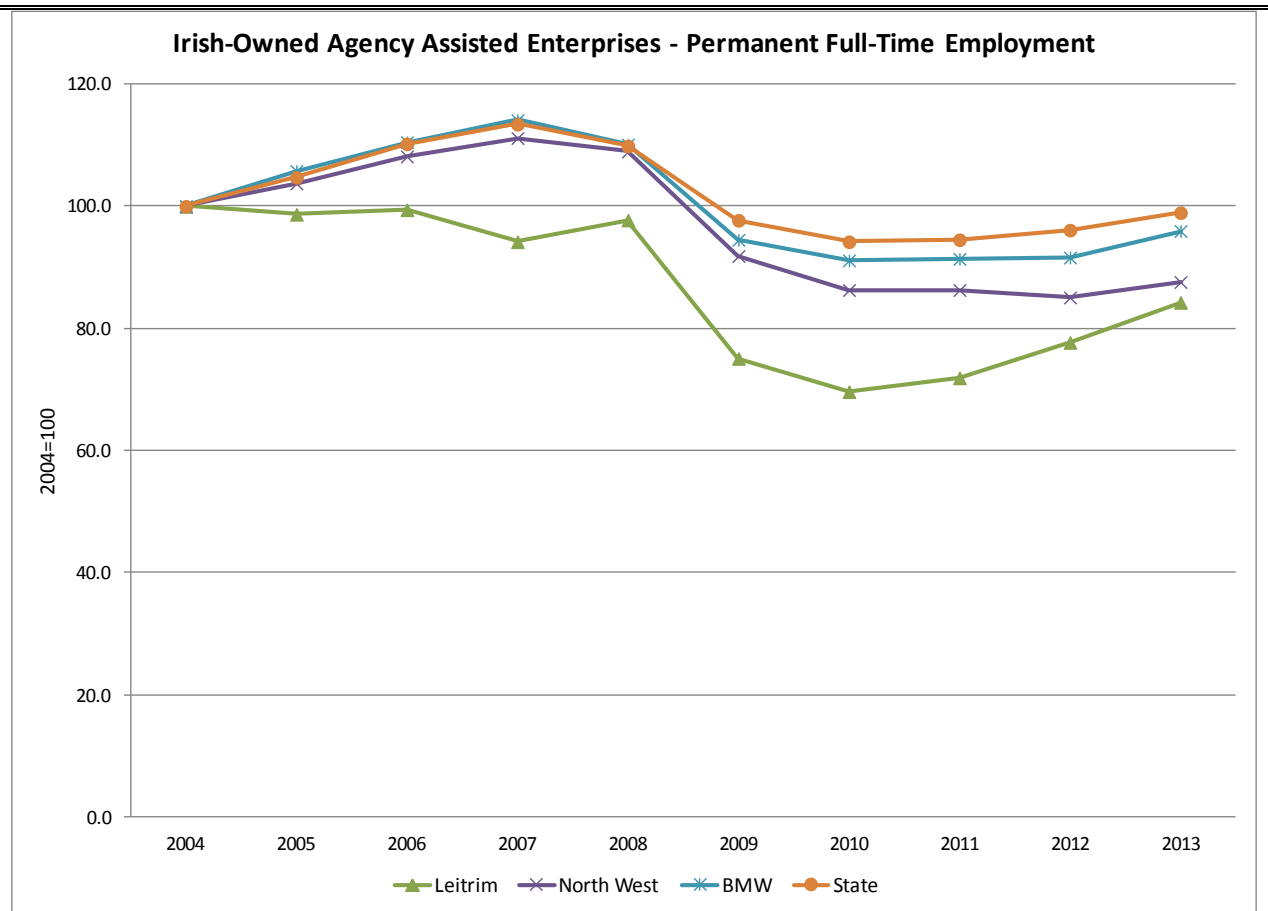
Figure A11: Map of IDA Ireland Site Visits with Potential FDI Firms in Irish Counties (2009-2014)



Source: Dáil Questions; The Journal.ie.

Note: The data are maintained by IDA Ireland.

Figure A12: Trend in Permanent Full-Time Employment in Irish-Owned Agency-Assisted Enterprises in Leitrim and Selected Other Parts of the Country (2004-2013) – Index Number Format (2004=100)



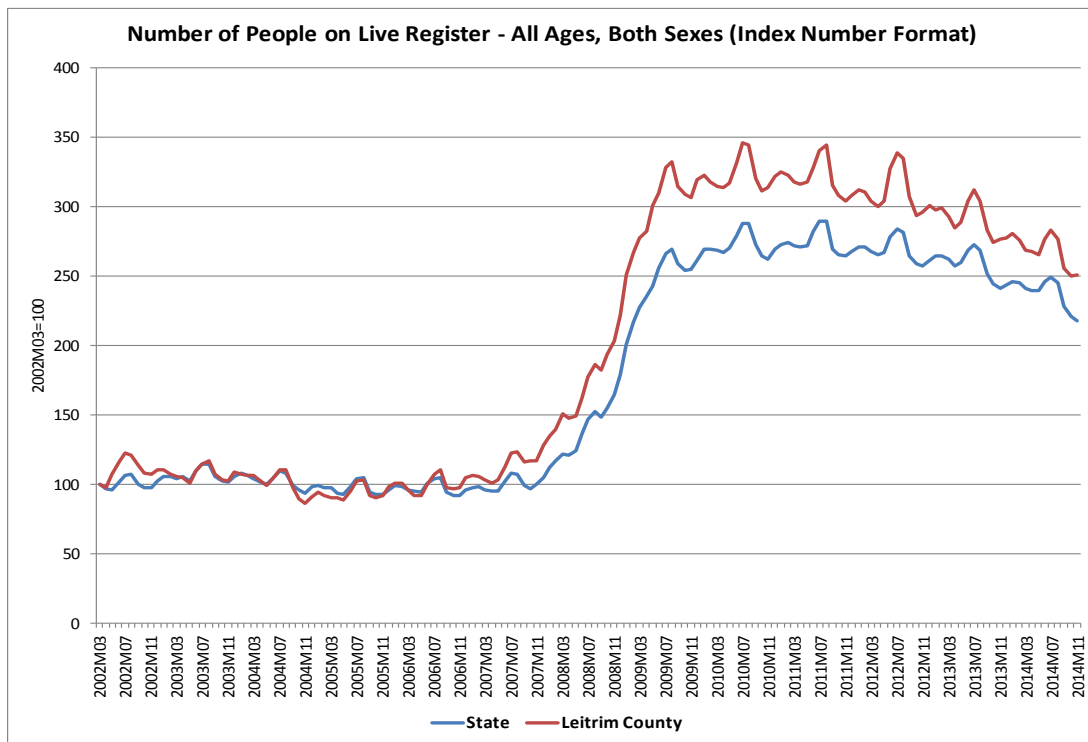
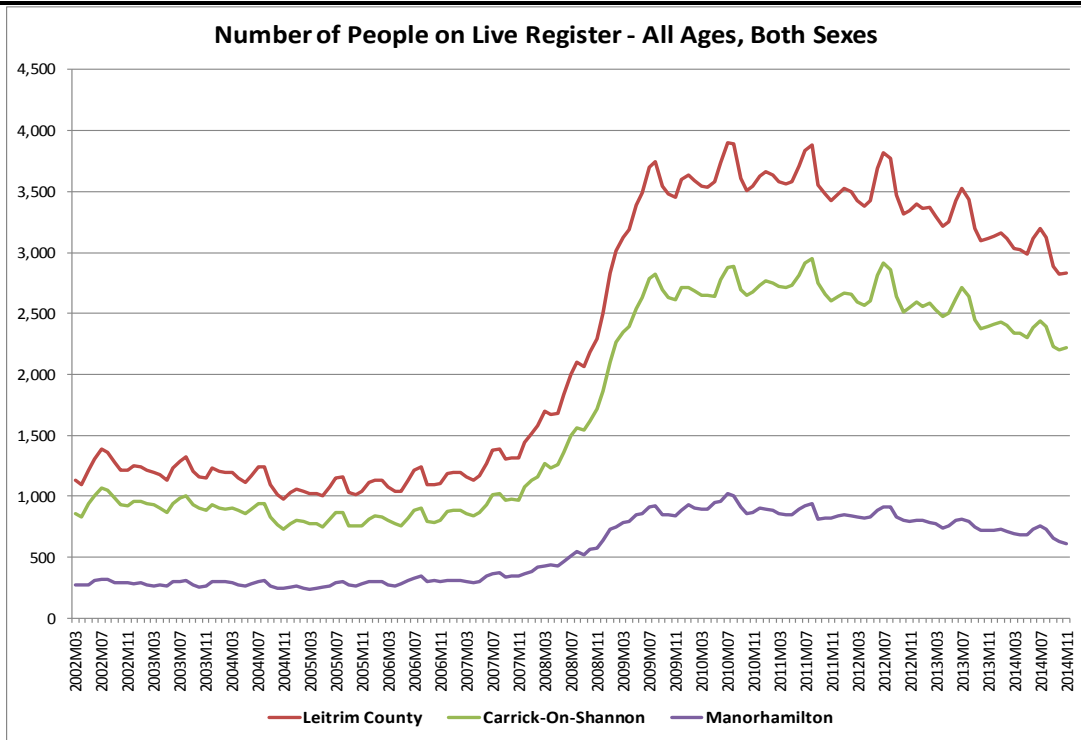
Source: DJEI data, FTI-PMCA Consulting on behalf of Leitrim County Council.

Table A15: Number of IDA Ireland Site Visits with Potential FDI Firms in Irish Counties (2009-2014)

Region	No. Clients	Total Jobs 2014	Jobs Growth	% Jobs
			2014	Growth 2014
Cavan	195	1,049	108	11.5%
Donegal	159	1,223	45	3.8%
Leitrim	126	388	117	43.2%
Louth	197	656	66	11.2%
Monaghan	170	904	61	7.2%
Sligo	202	1,103	73	7.1%
Border Region	1,049	5,323	470	9.7%
Kildare	103	683	63	10.2%
Meath	180	806	154	23.6%
Wicklow	97	572	137	31.5%
Mid-East Region	380	2,061	354	20.7%
Clare	161	1,346	202	17.7%
Tipperary North	130	482	107	28.5%
Limerick	216	1,292	198	18.1%
Mid-West Region	507	3,120	507	19.4%
Laois	85	384	35	10.0%
Longford	222	899	75	9.1%
Offaly	194	931	115	14.1%
WestMeath	242	1,284	38	3.0%
Midlands Region	743	3,498	263	8.1%
Carlow	206	1,152	207	21.9%
Kilkenny	243	1,154	196	20.5%
Tipperary South	148	895	62	7.4%
Waterford	300	1,515	152	11.2%
Wexford	170	1,070	210	24.4%
South-East Region	1,067	5,786	827	16.7%
Cork City	96	656	191	41.1%
Cork South	155	785	171	27.9%
Cork West/North	215	1,277	187	17.2%
Kerry	444	1,794	85	5.0%
South-West Region	910	4,512	634	16.3%
Galway County/City	239	882	105	13.5%
Mayo	182	1,060	53	5.3%
Roscommon	141	641	6	0.9%
West Region	562	2,583	164	6.8%
Dublin City	258	1,431	453	46.3%
DLR	211	1,304	156	13.6%
Fingal	142	562	126	28.9%
Dublin South	229	1,146	58	5.3%
Dublin Region	840	4,443	793	21.7%
State	6,058	31,326	4,012	14.7%

Source: DJEI data, FTI-PMCA Consulting on behalf of Leitrim County Council.

Figure A13: Live Register Trends in County Leitrim and the State (2002-2014)



Source: CSO data, consultancy team analysis.

Table A16: Estimates of Economic Impacts of Various Sectors Connected with the Leitrim Focus Groups (Average of All CSO Sectors = 100)

Economic Impact - Nationally				
Sector/Activity	Estimated Type II Multipliers			
	Output	Income	GVA	Employment
Agri-Food				
Agriculture, forestry and fishing	91	82	87	118
Food & beverages and tobacco products	89	81	83	71
Manufacturing, Financial & ICT				
Average of manufacturing activities	88	92	88	85
Computer consultancy; data processing	78	79	74	60
Financial intermediation services	104	94	106	78
Insurance, reinsurance and pension funding	92	84	84	61
Other financial activities	104	97	106	72
Creative & Arts				
Cultural and sporting services	91	92	111	103
Recreation services	93	107	117	142
Retail, Town Centre and Services				
Wholesale trade	90	90	94	71
Retail trade	102	104	107	133
Accommodation and food & beverage services	109	108	105	136
Insurance, reinsurance and pension funding	92	84	84	61
Other financial activities	104	97	106	72
Real estate services	86	78	100	57
Legal and accounting services; mgt consultancy	109	99	103	90
Architectural and engineering services	116	117	121	118
Advertising and market research services	126	117	104	99
Other professional, scientific services	76	87	109	71
Rental and leasing services	121	108	102	121
Employment services	93	84	99	70
Travel and tourism service activities	100	119	124	89
Security, office & business support services	116	95	99	92
Energy & Green Economy				
Electricity and gas supply	83	86	96	63
Water collection, treatment and supply	121	116	112	96
Sewerage, refuse and remediation services	95	91	105	90
Education, Training and Skills				
Education services	121	139	130	140
Average of All CSO Sectors				
	100	100	100	100

Source: CSO Input-Output and Supply and Use Tables (2010) (latest available at the time the data analysis was prepared), FTI-PMCA Consulting analysis.

Note: Type II economic impact multipliers generally include both intermediate supply chain effects and household effects through final demand (i.e. both indirect and induced effects). They are the broadest form of economic impact multiplier. Please also note that the CSO data underpinning the estimated Type II multipliers presented in this table relate to the whole country and not to regions or counties therein (data needed for this are not produced by the CSO, understandably so).