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22nd January 2019

Eastern and Midland Regional Assembly,
3rd Floor North Ballymun Civic Centre,
Main Street,
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Dublin D09 C8P5

rses@emra.ie

Re: Draft Regional Spatial and Economic Strategy

Dear Sir

We are the lead consultant acting on behalf of Swanhall Ltd., 17 Mount St Lower, Dublin 2.

Our client is the owner of lands at Gormanstown extending to 8.42 Ha as outlined and circled in black in figure A1 in the PMCA report.

We hereby make submissions in response to the consultation on the Draft Regional Spatial and Economic Strategy.

Our submission includes appendices with supporting research from:

PMCA, (economic strategy and population) ,
Brock McClure(planning sustainability and housing)
Future Analytics (Housing and spatial strategy)

as supporting appendices which provides further background research on the strategic accessibility of the lands at Gormanstown which are within walking distance of planned investment in the Dart rail services to Drogheda. Gormanstown will be the most strategically accessible location within Meath following the Dart investment and spatially Gormanstown provides the most sustainable location for residential development to meet pent up housing demand in the region.

Retention of the residential zoning of the lands at Gormanstown will underpin public transport investment in the Dart line. Failure to retain such lands for residential development is a failure to optimise sustainable residential development supported by public transport.

The substance and strategy to consolidate a more compact city and urban form as set out in the Draft RSES is of necessity a medium term to long term planning strategy, as it is dependant on consolidation of brownfield lands.

Therefore having regard to the immediacy of the housing crisis it is important to understand that the extensive tracts of land which are identified within the Dublin City and Metropolitan area for consolidation and are for example, the subject of a development plan variation in respect of the Naas Road lands, which comprise 178Ha within South Dublin Co Co and border similar lands within Dublin City, clearly comprise and are identified by the planning authorities as *medium to long term development lands*.

These lands are currently in productive commercial and industrial use but in the longer term will intensify and consolidate the urban area. This is the case with much brownfield lands.

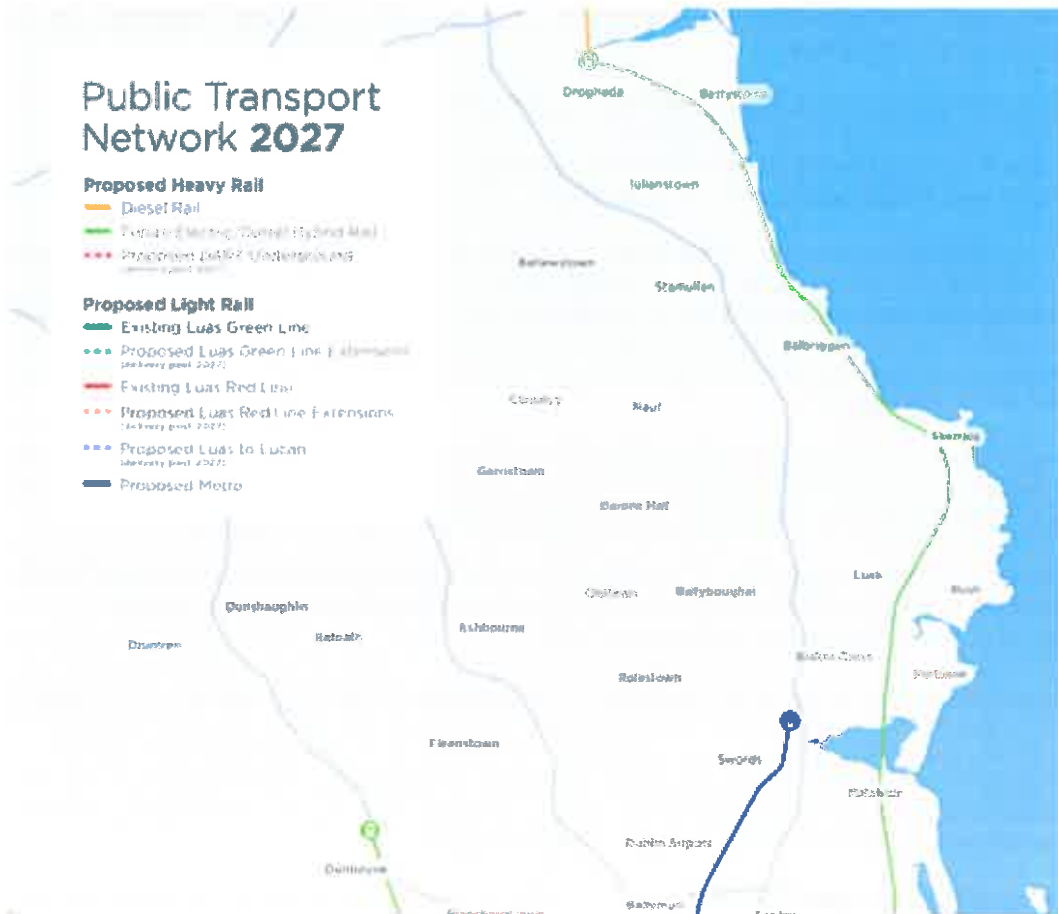
The core strategy for the urban areas have not therefore been affected by the proposed variation of 178 Ha and therefore compact urban redevelopment is a long term planning strategy.

The designation of metropolitan brownfield lands to consolidate residential development is both appropriate and sustainable but it is not the entirety of the solution to housing problems or economic opportunities and it is important to consider the extent of the lands available to meet housing need within the immediate short term framework.

The subject lands at Gormanstown have been designated for housing development for over 15 years as phase ii lands post 2019 in the development plan of Meath County Council.

In particular the lands at Gormanstown owned by our client, which are zoned as residential phase ii lands are of particular importance in the context of meeting immediate to short term housing need as these lands are:

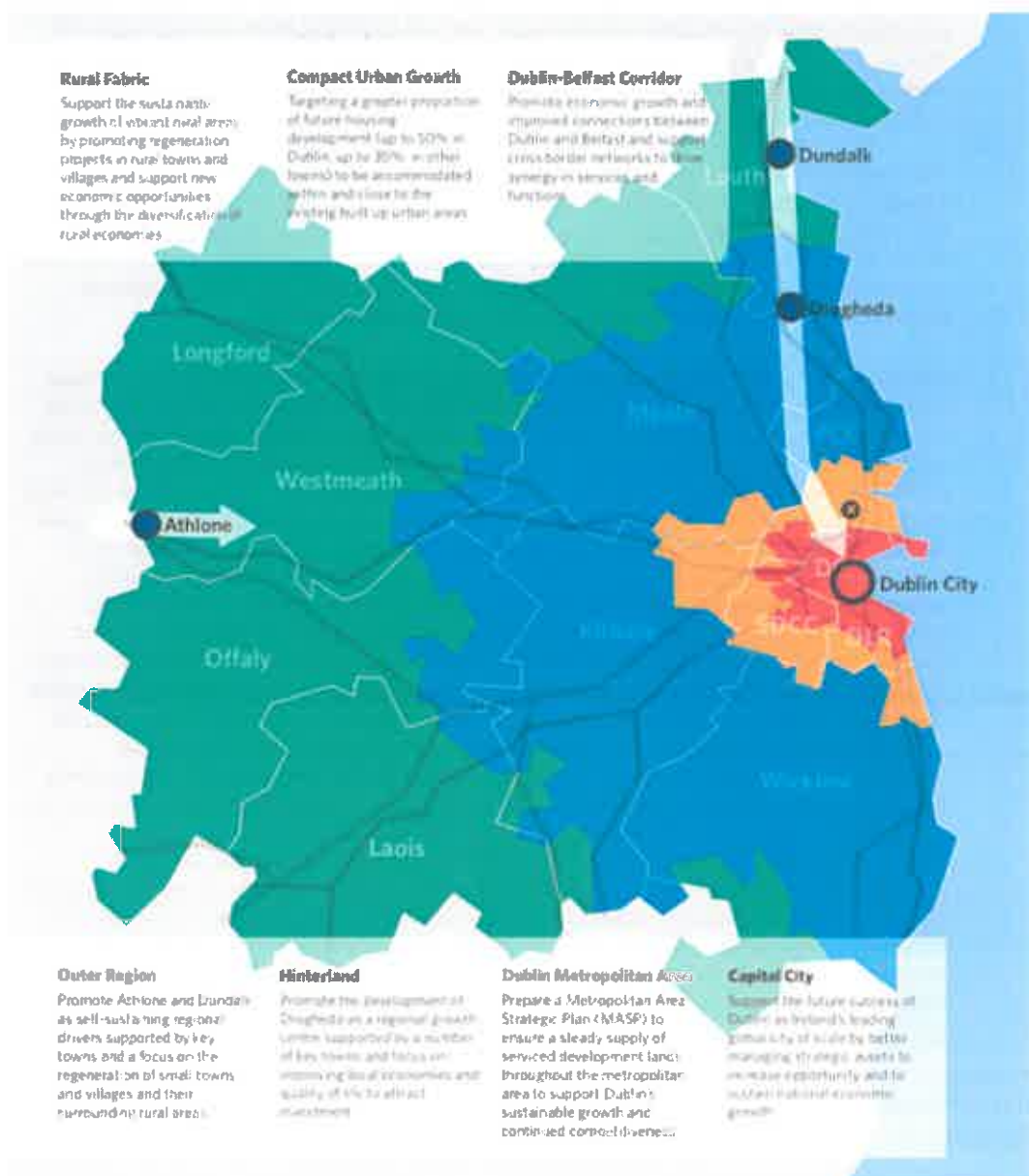
- Located on the Dublin Belfast Economic Corridor
- Are proximate to main line train, proposed dart extension and bus public transport services
- Accessible to Dublin Airport, seaport and motorway infrastructure.
- Designated and zoned for over 15 years
- Are on the identified line of new critical infrastructure services provision to be provided in the coming months by Irish Water serving the wider area of Stamullen and Gormanstown as part of coherent infrastructure planning and investment.
- Are proximate to social infrastructure in terms of schools, church and other community services
- Have been included in the Rebuilding Ireland Survey of lands available for housing provision



These lands are at the end stage of a long term planning strategy which has seen the lands included as phased development lands for the course of over three development plans. This phased planning approach is instrumental to provide the certainty for both private investor investment and confidence and also to structure long term planning of infrastructure and public transport in a coherent manner.

Residential development is an essential infrastructure component in and of itself to foster the development of the economic cluster and hub identified at Gormanstown, which is a unique asset and is instrumental to the success of the Economic Development Plan for Meath and the Dublin Belfast Economic Corridor which is an integral element of the strategic vision of the Draft RSES and the NPPF.

Compact urban growth will not deliver or resolve housing demand issues alone and designated zoned residential phase ii lands are essential to address the current gap in housing provision within the hinterland area in the Dublin Belfast Economic Corridor.



It is clear that in the current housing crisis and shortage of available housing accommodation the IDA are concerned that absence of housing provision is a deterrent to attracting necessary foreign direct investment and ultimately will constrain economic growth.

Our client has commissioned independent economic research, by Dr Pat McCloughan, PMCA, which concludes that the availability, accessibility and proximity of housing as accommodated on the subject lands is of strategic importance and necessary to underpin the Meath economic strategy to develop an economic hub at Gormanstown. We attach the full content of this report as supporting evidence of the strategic and regional importance of the subject site in contributing to addressing housing need in accordance with the policies of Rebuilding Ireland An Action Plan for Homelessness and in supporting the Dublin Belfast Economic Corridor.

The overall conclusion of this study is that the proposed residential development in Gormanstown, Co. Meath, have a justified rationale on the following grounds:

- *The need for additional housing in East Meath, which has seen some of the strongest population growth in Ireland over the past decade, resulting in strong housing demand, giving the strength of the economic recovery where the country is moving rapidly towards full employment (where the unemployment rate is expected to fall to 4.5-5% in the next year).*
- *The requirement to support the strong economic development occurring in the East Meath area, where the Drogheda Southern Environs LAP area in Meath has proved to be the fastest growing employment centre in County Meath during 2011-2016. Other parts of the East Meath area are also noteworthy in regard to meeting the goal of more persons at work within County Meath, for example City North Hotel and Business Campus, which currently employs in the region of 500.*
- *Further to the preceding justification for the proposed developments is the planned employment growth in the East Meath area over the coming years where approved economic development projects and/or investments in the pipeline could result in an additional c. 2,500 persons at work in this part of County Meath by 2026, in high quality, knowledge-oriented jobs, as targeted by the Economic Development Strategy for Meath 2014-2022. Many of these new jobs would be in or close to the Drogheda Southern Environs LAP area in County Meath, where one of the major proposals includes connecting a new high quality business campus with the rail line, which would thus be connected with the railway station at Gormanstown, which would benefit the people moving into the proposed new residential development for the village (Gormanstown College would also benefit from the proposed developments). The economic potential of the East Meath area in the heart of the M1 Dublin-Belfast Corridor is gaining momentum, judging by the employment growth to date and the investor interest/projects in the pipeline. To ensure the goal of the Economic Development Strategy for Meath of more people at work within the County working closer to where they live, new residential housing developments will be important, as an economic asset as well as serving to address the housing supply crisis. Accordingly, Dr. McCloughan considers that the proposed new residential development constitutes a Strategic Housing Development aimed at accelerating the delivery of larger housing proposals and would be integral to facilitating the goal of facilitating more employment in County Meath, in accordance with the Economic Development Strategy for Meath, which was integrated (through Variation No. 3) into the Meath CDP 2013-2019 in May 2016 by unanimous decision of Meath County Council. ¹*

This evidence based economic research suggests that the zoning and development of the subject lands at Gormanstown further supports and integrates the economic planning and development strategy of the NPPF and the Draft RSES and is of strategic regional importance in ensuring the sustainable success of the Dublin Belfast Economic Corridor.

¹ PMCA November 2018 page 16

Therefore it is important that the Draft RSES be amended to avoid any policies or objectives, within the settlement hierarchy or otherwise which would or could intentionally or unintentionally remove or dezone or exclude phase ii lands for residential development, which are located within proximity of the Dublin Belfast Corridor Economic Corridor.

We hereby request the addition of a fourth enabler in the section on Growth Enablers for the Dublin Belfast Corridor set out on page 29 of the Draft RSES:

- *Focussed residential growth at Gormanstown village on zoned phase ii lands to support the significant employment growth underway and anticipated to come on stream in the East Meath area.*

Yours sincerely



Ann Mulcrone

Draft Regional Spatial and Economic Strategy Submission



On behalf of Swanhall Limited

23 January 2019

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1 Introduction

1.1 Submission Summary

The Regional Spatial and Economic Strategy should promote the development of lands that are currently and clearly available, serviced and appropriately zoned in the identification of suitable regional assets that can serve as facilitators of regional growth. Gormanston is located on the strategic Dublin-Belfast corridor and is well served by both the road and rail network and other relevant infrastructure services. Serviced land banks such as the subject lands at Gormanston can serve as vital housing land supply to support economic centres such as Drogheda and Dublin. With population and employment figures rising in the east Meath region an adequate supply of zoned and serviced land will be required in future years.

1.2 Purpose of Submission

In November 2018 the Eastern and Midland Regional Assembly published the document – “*Draft Regional Spatial & Economic Strategy*”.



Figure 1: Draft Regional Spatial & Economic Strategy

This submission was prepared by Brock McClure Planning and Development Consultants on behalf of Swanhall Limited in response to the invitation by the Eastern and Midland Regional Assembly to submit views of the document – *Draft Regional Spatial and Economic Strategy*. This submission focuses on some key points within the draft Strategy document, which we consider, should be reinforced when it is published later this year.

Brock McClure Planning and Development Consultants have been involved in a wide variety of public and private sector projects over the past number of years. These projects have included a broad diversity of development types in various locations.

Swanhall Limited have been at the forefront of the development industry for a number of years and have a broad range of development experience that can be appropriately reflected in a national, regional and local planning framework.

Having reviewed the Draft Strategy on behalf of Swanhall Limited we consider that as currently presented, elements of regional planning policy in our view need to be reviewed and modified as set out in this report.

The *Regional Spatial and Economic Strategy (RSES)* when finalised should provide clear policy guidance and principles relating to development in suitable locations as stated in the vision for the region:

“To create a sustainable and competitive region that supports the health and wellbeing of our people and places, from urban to rural, with access to quality housing, travel and employment opportunities for all.”

The purpose of this submission is to highlight the opportunity for currently zoned land to support housing and employment objectives by maintaining the status of these lands given that they are serviced and well connected to the wider region.

1.3 Role of the Regional Spatial and Economic Strategy

The preferred spatial strategy for the Eastern and Midland Region is the consolidation of Dublin plus the Regional Growth Centres of Athlone, Dundalk and Drogheda and supported by planned focussed growth in a limited number of self-sustaining settlements. The subject lands must be considered as supporting the strategic function of Dublin as the primary urban centre and Drogheda, which is an emerging economic driver for the eastern region.

Figure 2 below illustrates the Growth Strategy for the Region that is illustrated in the RSES document. The subject lands are located generally within the Dublin-Belfast Corridor, south of Drogheda.

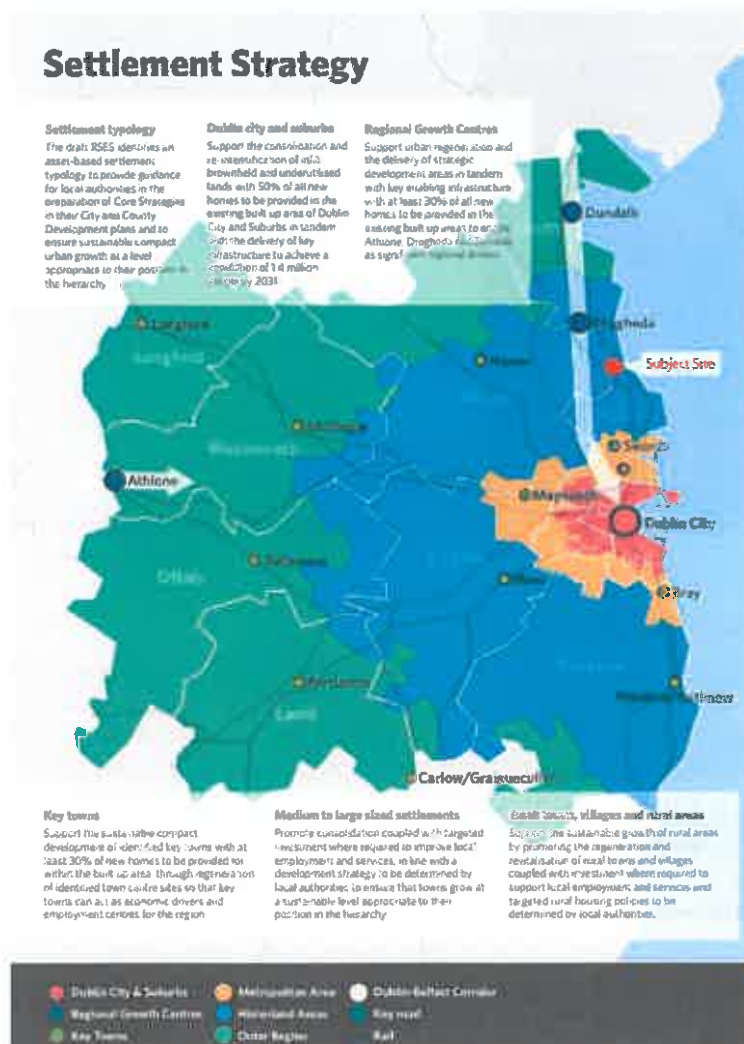


Figure 2: Eastern and Midlands Growth Strategy

Objectives of the growth strategy are to support Dublin through the Metropolitan Area Strategic Plan, target growth of the regional centres of Athlone, Drogheda and Dundalk, support vibrant rural areas, “Facilitate the collaboration and growth of the Dublin-Belfast Corridor”, and embed a network of key towns through the region.

Gormanston is located on the M1 Motorway linking it to a strategic road network that performs a variety of functions:

- Provides Inter-urban Routes to connect centres of economic activity such as Drogheda and Dublin
- Forms and connects to the most significant Public Transport Network in the Country for inter urban trips
- Provides a freight transport network for the country

These three facts cumulatively mean that Gormanstown is strategically located to perform as a significant engine for economic growth and if appropriately managed can allow focused development that will allow Ireland to continue to compete at an international level and attract international investors.

Allied to this road connectivity, the access to the strategic rail network will further enhance the strategic transport links of Gormanstown and lands in the vicinity. The challenge of the RSES will be to capture the development potential of such strategically located land areas and allow these areas to be brought forward for development in a timely manner to allow for sustainable land use practices to be realised. Serviced and zoned land that is readily available and positioned for residential development to support the economic objectives of the region, should not be squandered.

1.4 Smarter Travel – A Sustainable Transport Future

In 2009 the Department of Transport published “*Smarter Travel – A Sustainable Transport Future 2009-2020*”. In this policy document the Government reaffirms its vision for sustainability in transport and sets out five Key Goals, Targets and Actions to achieve this vision.

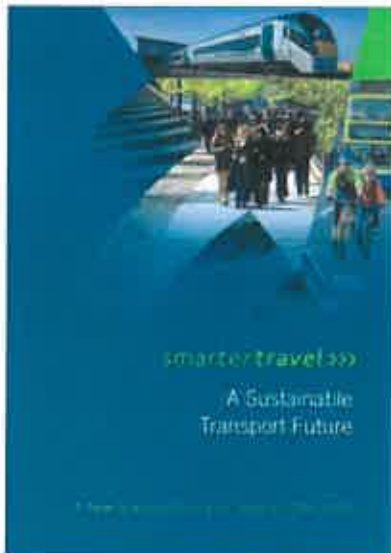


Figure 3: Smarter Travel – A Sustainable Transport Future 2009-2020

Smarter Travel sets down the context within which this must be achieved and states that “The efficient movement of goods is vital to our competitiveness and economic welfare” and sets out an Action for “improving efficiency in the movement of goods and promoting economic competitiveness”.

It is within this context of providing a transport system which facilitates and drives economic competitiveness the five Key Goals include the following:

- Improve accessibility to transport for all

- Improve economic competitiveness through maximising the efficiency of the transport network and alleviating congestion and infrastructural bottlenecks
- Minimise negative impacts of transport through reducing air pollutants and greenhouse gas emissions
- To reduce overall travel demand and commuting distances travelled by the private car
- Improve security of energy supply by reducing dependency on imported fossil fuels

The key challenges for spatial planning in Ireland as identified in the RSES and Smarter Travel - A Sustainable Transport Future are centred on economic competitiveness, appropriate design and environmental sustainability.

The Regional Spatial and Economic Strategy now has an opportunity to solidify country wide policy with regard to the management and roll out of development and the following submission sets out how this may be possible in the context of development ready urban areas and particular sites.

Section 3.2 of the RSES states the Dublin-Belfast Corridor is:

“the largest economic agglomeration on the island of Ireland, with the cities and towns along the corridor home to a population of around 2 million people. The Eastern Seaboard has seen the highest growth and highest internal migration of our population. The corridor links the two largest cities and the large towns of Drogheda, Dundalk and Newry on the island by high capacity road and national rail links and plays a critical role in supporting economic growth and competitiveness.”

The growth enablers for the Dublin-Belfast Corridor include:

- *“Compact and focused growth in the Regional Growth Centres of Drogheda and Dundalk to grow to City Scale*
- *Drive in the linkage between Dundalk and Newry to strengthen a cross border synergy in services and functions*
- *Improve accessibility and service by rail, road and communication between Dublin and Belfast.”*

Zoned land at Gormanstown is seen as providing land supply to support the growth of the region. Adequate residential land supply is a significant factor in accommodating appropriate growth in the region.

1.5 Project Ireland 2040 – DART Expansion to Drogheda

Project Ireland 2040 outlines a number of investment actions over the period of the plan including increased investment in public transport. Included in these public transport investment projects is delivery of priority elements of the DART expansion programme including investment in new train fleet, new infrastructure and electrification of new line. Expansion of the electric DART line to Drogheda is included in this programme to be completed by 2027 as shown below.



Figure 4: Greater Dublin Area Public Transport Network 2027

The provision of fast, high frequency electrified services to Drogheda will enhance accessibility to the region and by association the subject site. Coupled with an increase in employment opportunities in the East-Meath region the attractiveness of the area to live and work is set to grow in future years.

2 Subject Site

This submission is made on behalf of Swanhall Limited in response to the publishing of the Draft Regional Spatial and Economic Strategy. Swanhall Limited control a strategically located parcel of land in Gormanstown, Co. Meath to the west of the Gormanstown Railway Station and with convenient access to the national motorway network at the M1.

The subject land area extends to c.8ha in area and is located within Gormanstown Village. The site is generally agricultural in nature and is bounded by the R132 to the east and Flemington Road to the west.

The site is generally greenfield in nature and is generally flat. The strategic context location and general outline of the Gormanston Site (owned by Swanhall Limited) is illustrated in Figures 4 and 5 below.

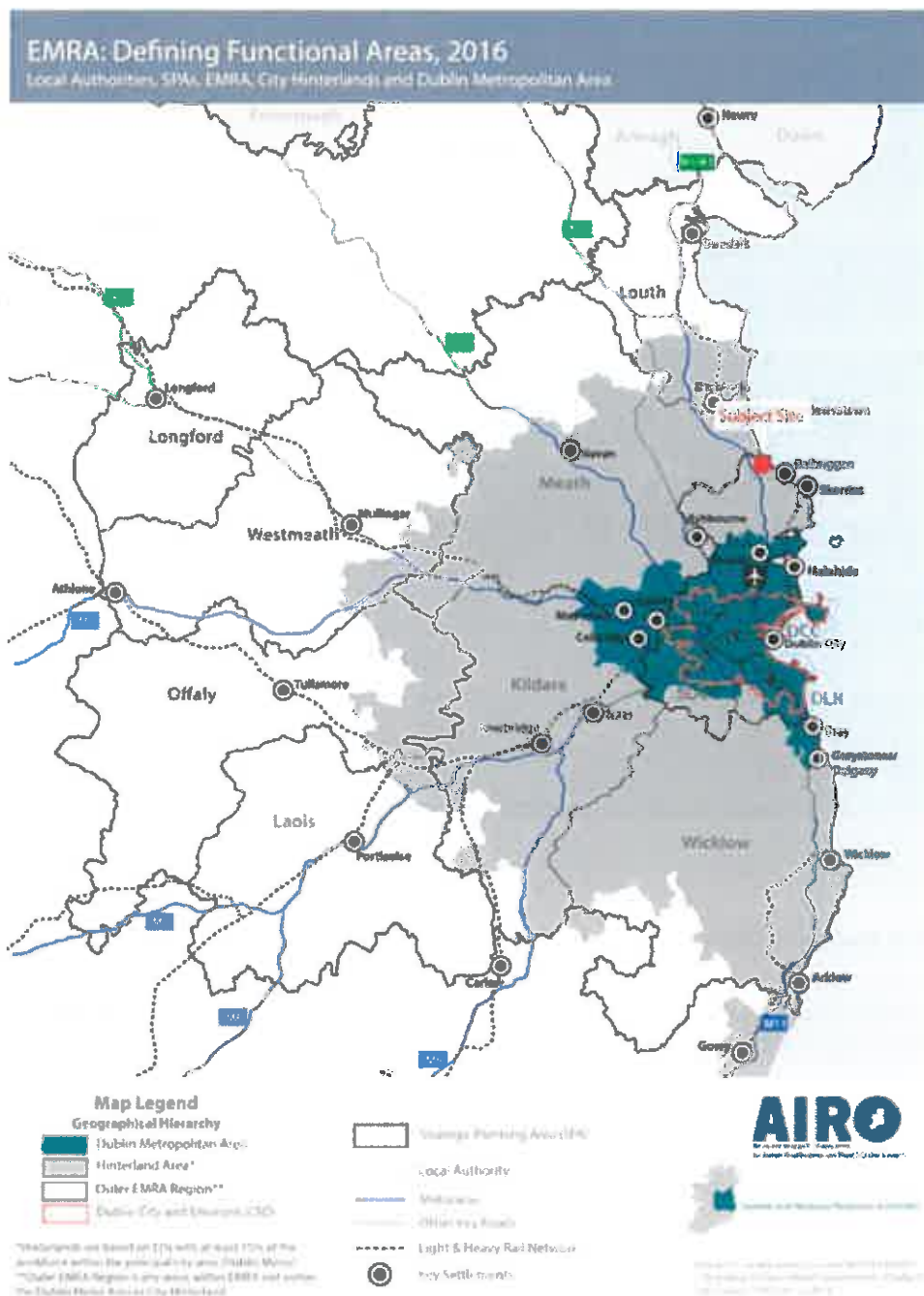


Figure 5: Strategic Context



Figure 6: Site Location

The Dublin-Belfast Railway line is located to the east of the site with the Gormanstown Railway station less than 800 metres from the site via the public road. Agricultural lands bound the site further to the north. The lands are less than 3km north of Balbriggan and east of Stamullen that has the potential to be an important economic hub in the region and is an accessible location for Drogheda to the north and Dublin to the south. Development in such close proximity to an existing railway station would promote sustainable development and maximise the utilisation of existing infrastructure. Further strategic location context graphics are illustrated below.



Figure 7: Distance to Gormanstown Train Station



Figure 8: Strategic Site Location with Wider Connections to M1

3 Current Planning Context – Gormanstown Landholding

3.1 Gormanstown Written Statement – Meath County Development Plan 2013-2019

The Gormanstown Written Statement identifies the Subject Site as one of the most logical and appropriate locations for the expansion of residential development in future years to the east of the Village Road and where the bulk of residential development can take place. Lands to the west are predominantly identified for community, social and educational facilities. The zoning map for the area is outlined below.

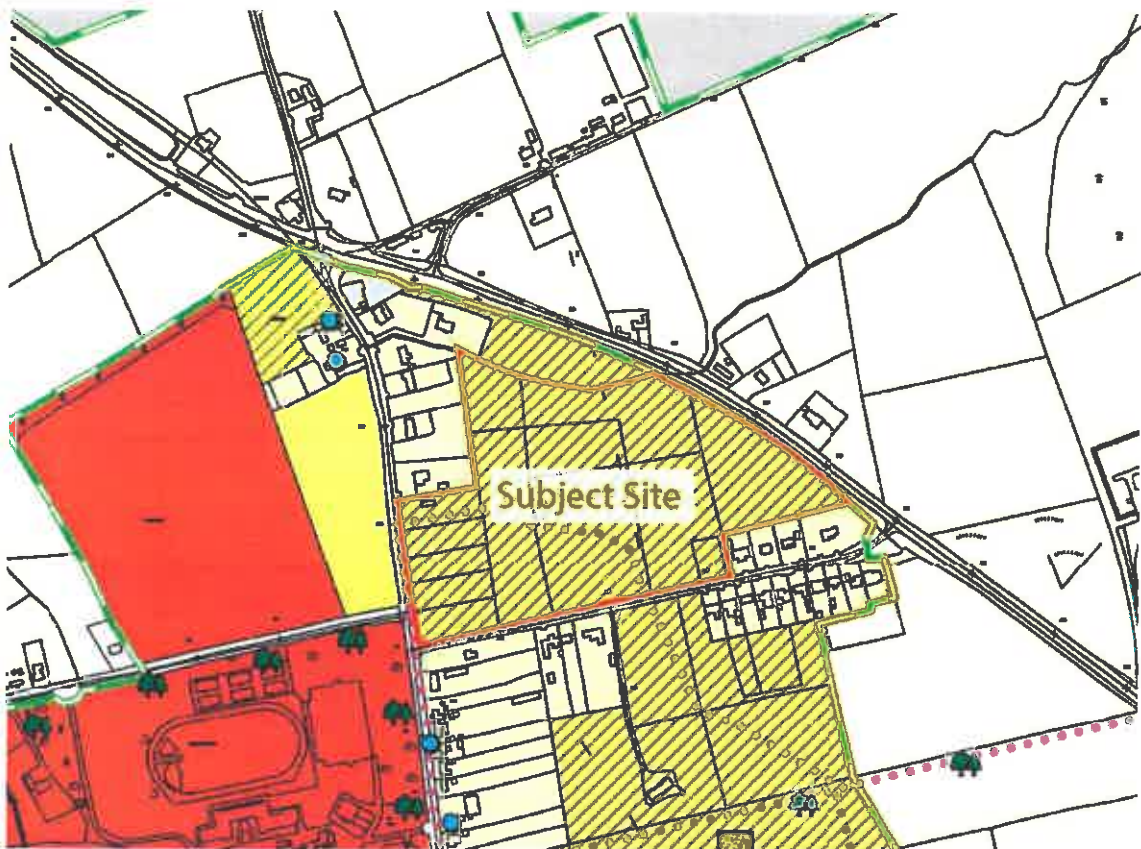


Figure 9: Gormanstown Land Use Zoning Map with subject site identified

Consequently the land is zoned for residential uses under the A2 residential zoning, which has an objective "To provide for new residential communities with ancillary community facilities, neighbourhood facilities and employment uses as considered appropriate for the status of the centre in the Settlement Hierarchy." The lands are also identified as "Residential Phase II (Post 2019)". A pedestrian walkway is also identified through the site.

The Development Plan states the following with regard to the development of phase II lands under Strategic Policy 3 (ii):

"The lands identified with an A2 "New Residential" land use zoning objective but qualified as "Residential Phase II (Post 2019) are not available for residential development within the life of this Development Plan."

Given the life of the current Meath County Development Plan is almost at an end it would be logical to bring forward these lands for residential development at this stage. This is particularly relevant given the economic context outlined in the attached Economic Report by PMCA Consulting that highlights increasing population and employment in the area that will require residential land supply in the near future.

The Gormanstown Written Statement identifies that the Mid East Regional Authority Economic Development Strategy acknowledges Stamullen as a "Secondary Economic Hub" based on the

development of a deepwater port, further supporting the clustering of a wide range of economic activities leveraging on the existing economic base. The Gormanstown Written Statement refers to the following:

“This in turn supports the conclusions drawn by Indecon International Economic Consultants who prepared an “Economic Development Strategy for the M1 Economic Corridor” for the period 2010 – 2022 on behalf of Meath, Fingal & Louth Local Authorities. The resultant strategy also identified the Stamullen / Gormanston area as being suitable for creating an employment hub serving the wider East Meath area.”

“There is a proposal to develop a world class deepwater port, logistics centre and business park at Gormanston, County Meath. At present, Bremore Ireland Port Ltd. is considering different options to advance the project through the statutory planning consent process. The development of the deepwater port would transform the economic and employment prospects of the East Meath – North Fingal area and establish a new economic hub on the Dublin – Belfast M1 Corridor. The current status of the project is that pre-feasibility and environmental / habitat assessment is being carried out. It is also noted that pre application consultations with An Bord Pleanála for a proposed Strategic Infrastructure Development application are also underway. Meath County Council is committed to the development of a deep water port and associated landside activities in East Meath.”

Should this economic development occur, there will be an obvious and immediate need for additional residential development in this area. Removing Phase II lands from zoned and serviced residential supply would effectively mean that the lands zoned A2 currently will be sterilized for possibly a 6 year period after which the next Development Plan process can commence. This will potentially marginalize a vast land bank that could accommodate substantial residential development in the coming years.

This approach will not help with the delivery of residential development on development ready land as is evidenced by the current housing shortage in the Greater Dublin Area.

Residential housing supply has become a very real issue in Ireland over the past 5-6 years. A report by the Housing Agency in July 2015 titled “National Statement of Housing Supply and Demand 2014 and outlook for 2015-2017” states the following with regard to housing supply and demand:

“there is a persistent mismatch between the supply and demand for housing, particularly in Dublin and surrounding counties, and major cities such as Cork, Galway and Limerick.

Nationally, there was an undersupply of the required housing in 2014 (73% of the requirement was provided), allowing for pent up demand from 2012 to 2013. In addition, new household formation is projected to increase for each of the next three years and an accelerated delivery of residential units is required to address this deficit.”

The subject site within a key economic region has the potential to provide a significant number of residential units of much needed housing stock on readily serviced sites. The lands are proximate to and well served by public transport and other transport infrastructure. Such sites should be promoted for development purposes within the Regional Spatial and Economic Strategy and where possible, not needlessly delayed by duplicate planning processes such as a subsequent County Development Plan that would delay this land coming forward for development to an unspecified time in the future when the delay in housing supply could intensify an existing, chronic, undersupply.

4 Points to Note on Regional Spatial and Economic Strategy Consultation

The east Meath Region and the subject site is a prime example of development lands that can be positively influenced by the provisions of the new Regional Spatial and economic Strategy (RSES).

4.1 Point of Submission – Strategic Issues

Section 4.3 of the document “Regional Spatial and Economic Strategy” for the Midlands and Eastern region is concerned with defining a settlement typology and existing plans and on that basis the following is outlined:

“Where there may not be an ideal fit between some current plans and the more up to date broad national and regional future development parameters set out under the NPF, this strategy and/or updated data that might be circulated by the Department from time to time as new information (i.e. Census Data) becomes available, appropriate transitional arrangements will be put in place.

For example, the consideration of development land prioritization measures by local authorities rather than ‘de-zoning’ of land, where there may be a surplus, would be more appropriate. The Department of Housing Planning and Local Government (DHPLG) will provide updated planning guidelines on their development plan functions to planning authorities in this regard. The NPF or the NPF Implementation Roadmap document, do not seek the dezoning of land, however”

As outlined in the draft RSES it is appropriate to examine the relationship between population projections, housing supply, location and supporting infrastructure as part of a strategic analysis of the necessary approach to planning for people and places. This does not involve dezoning of land. Gormanstown is part of the Greater Dublin Area and Eastern Region and it plays an important role in the overall economic strategy of the country. The Draft RSES further states the following:

“Furthermore, the zoning of land and planning permission alone, do not necessarily guarantee delivery and population growth in accordance with projected, targeted timeframes.

Therefore, in planning for future growth, it will be important for planning authorities to set out and monitor the service capacity and likely rate of completion of development on zoned lands, both brownfield and greenfield as well as elsewhere, having regard to local conditions and trends.”

With development ready lands, such as those at Gormanstown, they should be brought forward in the development process where the landowner, planning provisions and supporting infrastructure are all in place. It is important that sufficient land supply is available as very often the quantum of land that is zoned for residential development is not completely available for residential development when development constraints such as open space, archaeological heritage and flood risk matters are all taken into consideration.

4.2 Point of Submission - Gormanstown Landholding

It is our submission that Regional Spatial and Economic Strategy should prioritise serviced development lands in the development strategy for the island of Ireland. This is particularly relevant in regions of strong economic growth such as East Meath where there will be an obvious requirement for additional housing supply in future years.

There has been speculation in the recent past that tax interventions would be necessary by the Government to encourage the development of serviced and zoned land. After the financial crisis in 2008 it was apparent that there was an oversupply of zoned land with the subsequent dezoning of much of this land. In June 2008, there was 14,191 hectares of serviced zoned land in the state, enough for up to 462,000 potential new units (DECLG 2014). In addition, there was another 30,000 hectares of un-serviced zoned land. This mis-match between zoned and serviced land and dezoning of residential land has lead to a shortfall in residential development land and therefore land that is appropriately zoned and serviced should now be maximized before the need for further residentially zoned lands are to be identified.

Gormanstown is well placed to take full advantage of effective infrastructure including public transport provided by the high capacity Belfast-Dublin railway line and economic development associated with Drogheda, Stamullen and Dublin in a wider context. The travel times to Dublin and Drogheda are shown below.



Figure 10: Travel times from Subject Site to Dublin City centre



Figure 11: Travel Times to Drogheda from Subject Site

In order to avoid early obsolescence of the supporting infrastructure serving the area (rail, road and services infrastructure), provisions should be put in place to maintain zoned land for development. While these sites may only be a small piece of the picture in an overall regional strategic planning sense, they can be the catalysts for positive change in how development land is brought forward and in responding to the national housing shortage currently ongoing. This is supported by the following text from the draft RSES:

“sites with long-term development potential at priority locations should not be ‘reserved’ at the land allocation stages of the plan-making and implementation processes, in such a way as would create an unreasonable dependency on such sites being brought forward or that would impede the bringing forward of other suitable lands with better prospects for delivery in the short term, if the strategic sites are not being brought forward by their owners.”

Considering the foregoing, the subject lands and similar located and serviced development sites should be suitably identified and prioritised for development in the short term in the Regional Spatial and Economic Strategy. This may be done by way of graphical representation or through supporting policy text and is logical for the following reasons:

- Inappropriate to allow serviced, well connected land to lie idle with no return on investment on infrastructure;
- Underutilised lands available proximate to public transport and local amenities providing an important support base to the surrounding regional economy should be promoted;
- Other residentially zoned sites in some location have not provided appropriate development impetus due to shortcomings in available infrastructure;
- Opportunity for comprehensive residential development supply; and
- Facilitate development in line with the Planning Authority’s vision for the economic development of the Stamullen Economic Hub and the Growth of Drogheda into the Meath Local Authority Area.

4.3 Point of Submission – Developer Credentials

Another crucial element to this development equation is a developer that can and will build, and will not retain development land in the hopes of increasing land values.

Property speculation where land is bought, rezoned and sold on to a developer can add as much as €30,000 per unit to property values, which adds further to the issue of housing affordability. The subject landowner (Swanhall Limited) are a proven development entity that have remained generally unaffected by the most recent economic downturn and these types of developers, with suitable development sites and financial backing, should be stimulated rather than delayed unnecessarily through the planning process. This is supported in the following details from the Draft RSES:

- *“Closer attention to the actual delivery (of housing) is required and PAs are to take steps that may be necessary to implement strategic planning aims and “above all avoiding the hoarding of land and/or planning permissions.”*
- *PAs to tackle any tendencies towards land and/or planning permission hoarding, or excessively slow delivery using vacant site levy “and the release of alternative lands where permitted development, without any wider delivery constraints, is not being brought forward.”*
- *PAs to avoid creating “an unreasonable dependency” on sites would impede the bringing forward of other suitable lands with better prospects for delivery in the short term, if the strategic sites are not being brought forward by their owners.”*

4.4 Point of Submission - Funding, Return on Investment and Developer Contributions

Any public investment requires an economic or social return on that investment. Lower usage levels in the early years on any infrastructure investment can undermine the economic return on which the project was justified originally. Overall economic activity and prosperity is the key driver of increased demand for transport and other infrastructure. This logic can be applied to the infrastructure put in place surrounding the subject site including rail and road infrastructure. There is obvious capacity for growth in this regional area given the potential of Stamullen as a secondary Economic Hub and the initial investigations that have been undertaken for Bremore Port.

Should a further impetus occur to economic development in the area, there will need to be sufficient land zoned for residential development to support this growth. The attached Economic Report by PMCA Economic Consultants highlights the strong growth in East Meath resulting in strong housing demand and movement towards full employment. To ensure the goals of the Economic Development Strategy for Meath, including having more people working in the county working closer to where they live, an appropriate supply of residentially zoned land should be available.

The RSES should include details in their planning process for Regional Development that will support the larger urban centres, including providing employment and housing at accessible locations on both the road and rail networks.

5 Conclusion

Developed correctly, a Regional Spatial and Economic Strategy should be the catalyst for economic growth and regeneration. It is ironic therefore that due to lack of appropriate implementation the precursor to the RSES, the Regional Planning Guidelines for the GDA, which was intended to put a structure on growth and development, failed in a number of its goals and objectives over a 12 year period. This is mainly down to inappropriate implementation and is also attributable to market forces including the economic downturn. Despite aims associated with regional divergence across the Country, the observed trend seems to be a leaning towards urban centres where the majority of jobs are located. This would suggest that the population will continue to locate at employment hubs in future years and substantial growth in the East Meath Region has demonstrated that this is a viable area for ongoing employment growth in the short-medium term.

There have been instances in the past where a plan led development was seen as the appropriate response to the provision of necessary land uses at particularly locations. In many cases however this has not taken place on an acceptable level of consistency.

Critically, the opportunity exists with this new Regional Spatial and Economic Strategy to identify suitably serviced and zoned lands - that are supported by developers who are now ready and in a position to develop – to provide the impetus for growth objectives to be met through a development led solution.

This would provide a greater degree of control over where and how future development will take place in the short term leading to a more reliable long-term strategy in terms of the location for employment and other population based land uses. The four main points of this submission are:

- Strategic issues such as population and crucially supporting infrastructure should be considered when identifying appropriate development lands and these lands should not be rezoned but rather re-prioritised;
- Lands that are appropriately zoned and serviced, such as Gormanstown with significant land banks like the subject site – should be promoted as suitable locations for strategic development to support wider regional development goals;
- Sites that are owned by developers with a proven track record in delivery of projects and the resources to do so should be also promoted to avoid land hoarding; and
- Early return on investment in infrastructure should be a priority in the short term and this can be achieved through appropriate development strategies for serviced towns and areas.

For all of the above reasons and considerations, Gormanstown, with the subject site as identified, can be used as an example of development lands that is appropriate as a serviced and zoned area that has suitable financial backing and should be prioritized as the type of land bank to be maintained for residential development in conjunction with wider economic development. This would represent an effective use of serviced land in close proximity to the surrounding road and rail transport network, while pre-empting any future residential land shortages in the East Meath Region that might arise on foot of significant employment generating development.

Brock McClure Planning and Development Consultants

January 2019



Gormanston An Assessment of Housing Need and Strategic Importance of the Area

January 2019

PREPARED BY
 Future Analytics FOR

Swanhall Ltd

{GORMANSTON}

INTRODUCTION

Future Analytics Consulting Ltd., (FAC) of 23 Fitzwilliam Square (South), Dublin 2 has prepared this assessment in respect of residentially zoned lands to the north of Gormanston Town, Co. Meath. FAC is an established urban planning consultancy that advocates an evidence-based approach to proper planning and sustainable development.

County Meath is a significant strategic component of the Greater Dublin Area (GDA) and its locational advantage has a major part to play in the future development of Ireland's economy. Meath benefits from being both part of Ireland's primary economic hub and the largest market in the State. That position is jeopardised, however, by an undersupply of housing which limits the attractiveness of the county as a place in which to live, as a base for industry and employment and in terms of its role supporting Ireland's economic engine. The location of Gormanston town along the M1 economic corridor, with adequate residentially zoned lands and connectivity along a high-frequency train line, make it a key asset in delivering this expected future growth.

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CONTEXT

LOCATION

35 km from Dublin City Centre, Gormanston is one of the most accessible locations in Meath. Located 800m from Exit 7 on the M1 interchange, the town is optimally positioned to connect with Dublin in the south and Drogheda, Dundalk and Belfast in the north. Gormanston also benefits from the presence of the Dublin-Belfast railway line, providing regular commuter services from the town. The DART Expansion Programme will also deliver an augmented high-frequency electrified service to Drogheda (and Gormanston) by 2027.

Over 1.7 million people live within a one-hour drive of the town (36.3% of the country's population), and 915,709 within just the a 10km radius of the M1 motorway (19.2% of the country's population). The corridor area also provides 1-in-4 of the total jobs in the country (24.5%)(CSO, 2016).

The north-east of Ireland contains the largest and fastest growing towns. Drogheda, with a population of 40,956 (up 6.2% since April 2011) remained the largest town in Ireland. Swords (39,248) and Dundalk (39,004) complete the top three.

RESIDENTIAL OPPORTUNITY

As a smaller, more accessible town, Gormanston provides the prospect of a high-quality standard of living and a superior work-life balance.

There are a total of 52.3 hectares of undeveloped residentially zoned land in Gormanston, which have an assigned average density of 20 units per hectare. These lands have the capacity to support **1,046 new homes** (RLA, 2014) with a potential potential population equivalent of 2,793 additional persons (based on existing average household size for the town). This report seeks to address approx. 8 hectares of lands immediately to the north of the town (map overleaf).

- DART Expansion**
- DART Underground Station
 - DART Expansion Station
 - Existing DART Station
 - Proposed Four Track
 - DART Underground
 - Extent of DART Expansion

Dublin to Drogheda
DART Expansion Programme by 2027

Gormanston
Train Station

Access to Site
10 mins walk

Balbriggan
Train Station

Dublin - Belfast Rail Corridor

Exit 7 on M1

Site Access
2 Minute Drive

SITE

Gormanston

Stamullen

OVERVIEW OF SITE LOCATION

capable of
providing homes
for **2,800**
additional persons

52.3 ha
of residentially
zoned lands in
Gormanston

10 minute
walk from
Gormanston
Train Station

25 minute
drive-time to
Dublin city
centre

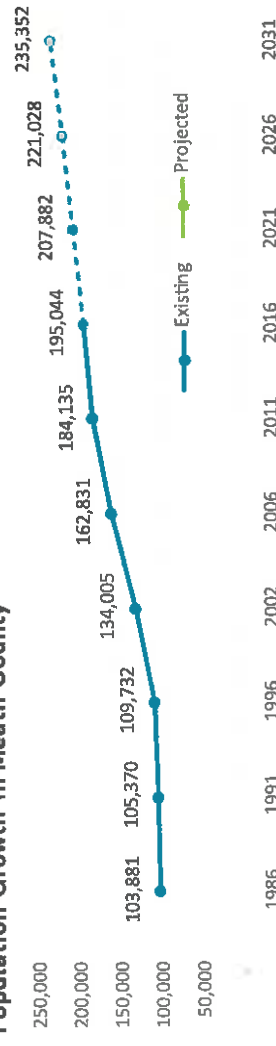
STRATEGIC CONTEXT

The opportunity offered by Gormanstown is best framed by its location within the county of Meath and by its context on the M1 corridor, defined as 10km from the M1 in all directions. The town itself is located at approximately the mid-point of the 'Dublin-Belfast corridor' between Dublin and the border with Northern Ireland. It is an international route, ultimately extending to Belfast in Northern Ireland (UK). The corridor is defined by its population, infrastructure, accessibility, economy and third-level educational institutions.

MEATH

The proximity of Meath to Dublin has been a central factor in the growth experienced in the county over the last 20 years, which saw the population increase by 78% between 1996-2016 and the housing stock increase by 134% during the same period. The population of Meath experienced considerable growth in the last decade, increasing by +19.8% between 2006 and 2016, to reach 195,044 persons. This was significantly greater than the state average of 12.3% during the same period.

Population Growth in Meath County



Moreover, the population is projected* to growth by an additional +13.3% over the next decade to 2026 (+25,984 persons). Using the current average household size for the county as a simple multiplier (3.03 persons per household) it would indicate a need to accommodate a minimum of **8,575** new units in the period to 2026, and 13,303 new units by 2031.



To project population for wards FAS uses the demographic context component methodology (CCM). The same methodology used by the Central Statistics Offices (CSO) it provides a flexible and powerful tool to assist in population projection by developing an array of comparative scenarios, each tailored around the application of qualified assumptions on mortality, fertility and migration (as well as with the CSO). Specifically the HET-UK scenario has been utilized herein.

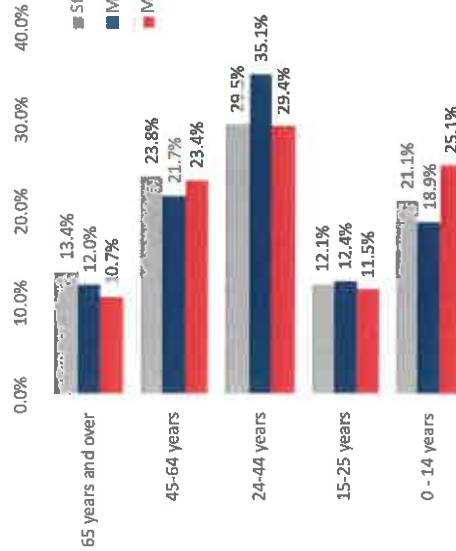
County Meath has very young population with 65.9% under the age of 44. Equally, 51.1% of households are made up of families with children. The demands for larger unit sizes are apparent in Meath with 38.5% of all current households consisting of 4 persons or greater (compared to just 30.5% in the state). This would indicate an increasing young demographic profile that are seeking houses within which to raise a family.

Gormanstown is within 30 minutes' drive time of the majority of the M1 economic corridor between Drogheda and Dublin making it an easily accessible location within the region. The wider 60 minute drive-time area has a population of over 1.7 million persons (representing 36.3% of the state population).

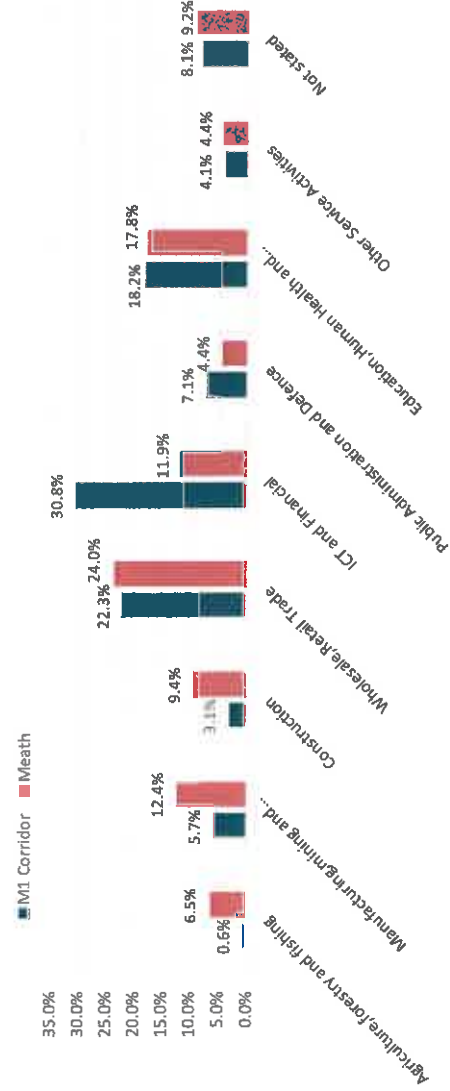
The Irish workforce is recognised as being one of the best educated workforces in the world. This is particularly true for the population in Meath and living along the Dublin-Belfast corridor. The proportion of the population who are working in Meath which have attained a Bachelor's or Postgraduate Degree is in excess of 42.8% (NFC 7+). This figure increases to 59.0% within the M1 Corridor area. The chart below also indicating that 30.8% of all jobs in the Corridor are in ICT or Finance positions (11.9% of all jobs for Meath) demonstrating the high quality of existing jobs employment.



Comparison Age Profiles, 2016



Proportion of Jobs by Industry, 2016





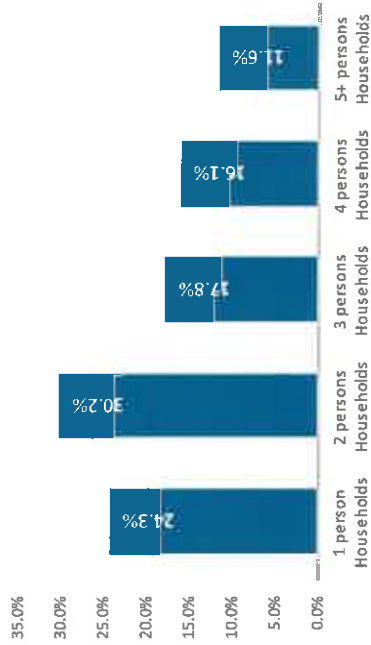
The corridor has a younger population than the state average, with 66.3% under 45 years of age, compared to 62.8% for the state. Within the M1 economic corridor 77.5% of households are made up of families, compared to 79% for the state. This would indicate an increasing young demographic profile that are seeking houses within which to raise a family. This would appear to be reinforced by the relatively low proportion of family houses within the M1 corridor with 71.2% compared to 86.5% across the state.

Gormanstown is ideally located to access employment hubs locally, for example the developing CityNorth campus, nearby Balbriggan, as well as the hub of Drogheda to the north and the major employment centres of Swords, Dublin Airport and Dublin City to the south.

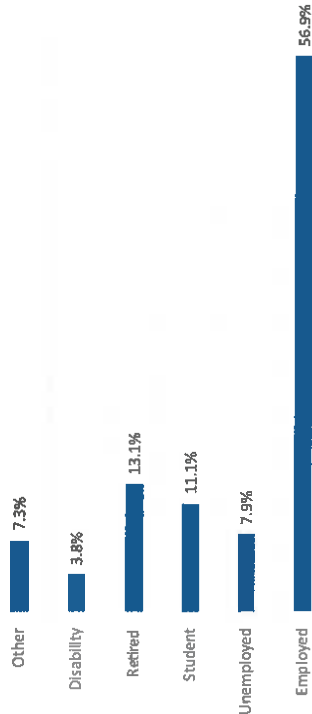
This importance of the M1 Corridor area cannot be underestimated. It is clear that in order for the counties within the M1 corridor area to continue to support future employment and economic activity, it will be contingent on the ability to provide a significant quantum of affordable residential options close to the corridor area.

Gormanstown should be prioritised as a suitable location for the development of a residential cluster given its location near employment, the availability of sufficient infrastructure and the capacity of the lands.

Housing Composition within M1 Corridor, 2016



Household Status within M1 Corridor, 2016



THE CASE FOR GORMANSTON

The population in Meath and indeed Dublin and Louth are expected to increase significantly over the next 10 years. This population growth is driven by its current demographic composition, proximity to infrastructure, accessibility, economy and third-level educational institutions. Sustaining this economic activity into the future will require sufficient housing to support a growing population along the Dublin-Belfast economic corridor.

The town of Gormanston is strategically located 35km north of Dublin City Centre and at the heart of the M1 economic corridor which provides almost a quarter of all jobs in the state. The town has the potential to provide homes for up to 2,800 people at a location which can easily access the M1 corridor as well as Drogheda and Dublin via the Dublin-Belfast rail line.

Population & Housing Demand Assessment
10 Year Growth (2016-2026)



At a time of established national demand and need for more housing provision of housing at this location is not only practical but is highly desirable in the context of providing homes for those wishing to access economic opportunities. **The proposed lands offer significant potential to deliver housing in sustainable locations.** Gormanston should be prioritised as a suitable location for the development of a residential cluster given its location near employment, the availability of sufficient infrastructure and the capacity of the lands.

WHY GORMANSTON?



{GORMANSTON}

PREPARED BY
 Future Analytics FOR

Swanhall Ltd

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The Economic Significance of the Proposed New Residential Development in Gormanstown, County Meath

11 December 2018

Introduction and Overview

This report is prepared by Dr. Pat McCloughan, Managing Director of PMCA Economic Consulting. It provides an evidence-based study of the economic significance of a proposed new residential development in Gormanstown, Co. Meath, on instruction of Sean Boyle Architects, Navan.

A map showing the location of the proposed new development is given in Figure A1 in the Annex of Supplementary Information at the back of this report (p. 17). The site (ringed in black in the map) occurs in the centre of the village, close to Gormanstown College, and is favourably located in respect of access to the M1 Motorway (southwards towards Dublin and northwards to Drogheda, Dundalk and Belfast).

The proposed residential development is being submitted *directly* to An Bord Pleanála (ABP) as a Strategic Housing Development under the Planning and Development (Housing) and Residential Tenancies Act 2016, enacted on 19 December 2016, and the Planning and Development (Strategic Housing Development) Regulations 2017, which came into effect on 3 July 2017. The new legislation forms a key part of the Government's 'Rebuilding Ireland' initiative (2016), which aims to accelerate the delivery of larger housing proposals.

This report focuses on the economic significance of the proposed development. In 2015, Meath County Council launched its Economic Development Strategy for County Meath 2014-2022. Dr. Pat McCloughan, the author of the present report, was the lead author of the Economic Strategy; the others were John Spain Associates (planning) and FTI Consulting (marketing). On 23 May 2016, the Economic Strategy was integrated into the Meath County Development Plan (CDP) 2013-2019 *via* Variation No. 3, by unanimous decision of the Elected Members of Meath County Council. Positively, the Economic Strategy has been embraced throughout the Council and by other stakeholders with an interest in facilitating more employment *within* the County, and has already yielded significant new job announcements/wins for Meath, with more in the pipeline. East Meath, and the greater Drogheda area in the heart of the M1 Corridor, is identified as a key employment development location in the Economic Strategy. In recent years, employment in the Meath environs of Drogheda has grown strongly and today there are planning applications in train for substantial new employment developments in the area, which would be 'game-changers' for the whole County and wider region, in addition to the East Meath area.

In this context, the proposed new residential development in Gormanstown would have strategic importance in making East Meath more attractive and competitive as an investment and employment location, thereby aiding the goal of the Economic Strategy of having more people at work *within Meath closer to where they live* (as opposed to more outward commuting to work in Dublin). The strong transport infrastructure (including the rail line linking Gormanstown with Drogheda) is also notable. Gormanstown Railway Station is on the Dublin-Drogheda-Dundalk-Belfast line, the busiest main line on the island of Ireland, and is well served by frequent services north and south. An added attraction of the proposed new development is that it would facilitate access to Gormanstown Station (only a 10 minute walk away) and it would also support the growth and development of Gormanstown College.

Economic Context

Meath Economic Development Strategy

Introduction

The Meath Economic Development Strategy 2014-2022 provides the blueprint economic roadmap for County Meath until 2022, where the key objective is to facilitate the creation of more employment *within* County Meath over the coming years. The Economic Strategy also underpins the Economic Element of the Meath LECP (Local Economic and Community Plan) 2016-2021 and in addition Meath County Council's interactions with the EMRA (Eastern and Midland Regional Assembly) regarding County Meath in the context of the EMRA's Regional Spatial and Economic Strategy. The EMRA RSES is being finalised (at the time of preparing this report) and will seek to coordinate the economic and spatial/planning strategies of Meath and the other local authority areas in the EMRA Region.¹

In short, the Economic Development Strategy is an important and influential document for County Meath and for both the officials and the Elected Members of Meath County Council. The leadership of the Council has ensured buy-in to the plan across the organisation, and it has been held up nationally as an exemplar for integrated planning in respect of the spatial and economic dimensions of sustainable development at local authority level.²

The Target to Facilitate 7,500 Extra Persons at Work in County Meath over the Period 2011-2022

The Economic Development Strategy contains a number of targets, all of which are SMART (each target is Specific to County Meath, Measurable with relevant official economic data, Achievable (and Ambitious), Relevant to the economic development of the County and Timely, to 2022).

The headline target is to facilitate an extra 7,500 persons at work *within* County Meath by 2022. The baseline level of employment in Meath was 38,822 in 2011 (the latest Census Year at the time the Economic Development Strategy was prepared during 2014-2015). Thus the main target seeks to raise the number of persons at work in the County to 46,322 in or by 2022.³

¹ The Meath LECP is accessible [here](#). The EMRA is part of the new regional governance structure in Ireland, under local government reform in January 2015 following the Local Government Reform Act of 2014 and 'Putting People First' (2012). A map showing the geographical coverage of the EMRA Region is given in Figure A2 (p. 18). The EMRA Region covers the administrative areas of twelve local authorities, namely Longford, Westmeath, Offaly, Laois, Louth, Meath, Kildare, Wicklow, Fingal, South Dublin, Dún Laoghaire-Rathdown and Dublin City. The 12 local authority areas are grouped into three Strategic Planning Areas, viz. the Midland, Eastern and Dublin SPAs. Meath, along with Louth, Kildare and Wicklow, is in the Eastern SPA. The three new regional assemblies, including the EMRA, replace the former (NUTS 2) Border, Midland and Western Region and the Southern and Eastern Region, and the eight (NUTS 3) Regional Authorities within the BMW and S&E Regions. The Regional Planning Guidelines will be replaced by the RSEs. Further information about the EMRA and the EMRA RSES can be found [here](#).

² See for example the article by McCloughan, P., Gallagher, P., Spain, J. and Devlin, J. 'Planning for Economic Development in a Hitherto Commuter Location – The Case of the Royal County', *Pleanáil: Journal of the Irish Planning Institute*, Issue 21, 2015/2016, pp. 44-64.

³ Local newspaper coverage of the 7,500 jobs target in the *Meath Chronicle* (17 January 2015) is reproduced in the Annex of this report (Figure A3, p. 19). The Economic Development Strategy is available [here](#) on Meath County Council's website.

Composition of Employment Important as well as the Number of Extra Jobs in the Economic Strategy

In addition to the headline target of 7,500 additional jobs in County Meath between 2011 and 2022, the Economic Strategy is also mindful of particular aspects of employment in Meath, including the high rate of outbound commuting from the County and the distribution of persons at work by sector. Both are linked. The Economic Strategy observes that much employment in the County is concentrated in traditional sectors and non-market activities (the traditional sectors, such as meat processing, furniture making and engineering also are more exposed to the adverse effects of Brexit). In 2011, just 12% of all employment in Meath was in IT, finance and professional services, compared with 18% for the State as a whole, and 30% in Dublin. Yet many of the outbound commuters, over three-quarters of whom work in Dublin, are working in these services and an important part of the Economic Strategy is to promote Meath as a competitive location for high quality market-based employment (by indigenous and foreign-owned firms), with the aim of ensuring greater economic impact locally and a strong base for sustainable communities.

Importantly, what has tended to happen in the past is that houses were built in Meath to attract people working and living in Dublin to relocate to Meath, whilst keeping their jobs in the capital. As a result, Meath has been characterised by a high rate of outbound commuting – the highest among any local authority area in the State outside of Dublin (in any event, one would expect commuting among the four local authority areas making up the capital to be high, where the biggest employment centre is the Dublin City Council area, which in 2016 accounted for 16% of all employment in the country, compared with its population share of 12% in that year).

The ideal scenario for County Meath, from an economic perspective, is to facilitate more employment opportunities *within* the County, with residential housing acting to support such economic development as well as addressing the housing shortage. In other words, Meath needs more jobs as well as more housing. Both are intertwined, particularly as far as County Meath is concerned.

The proposed residential development in Gormanstown is strategically significant in this economic context. It will help to augment the skills base locally in East Meath and to support the significant investment interest in the area, which is already being realised in the form of significant new employment in that part of the County, as envisaged in the Economic Strategy. The proposed development will also serve to alleviate pressure on house prices in the area, consistent with the Government's Action Plan for Housing.

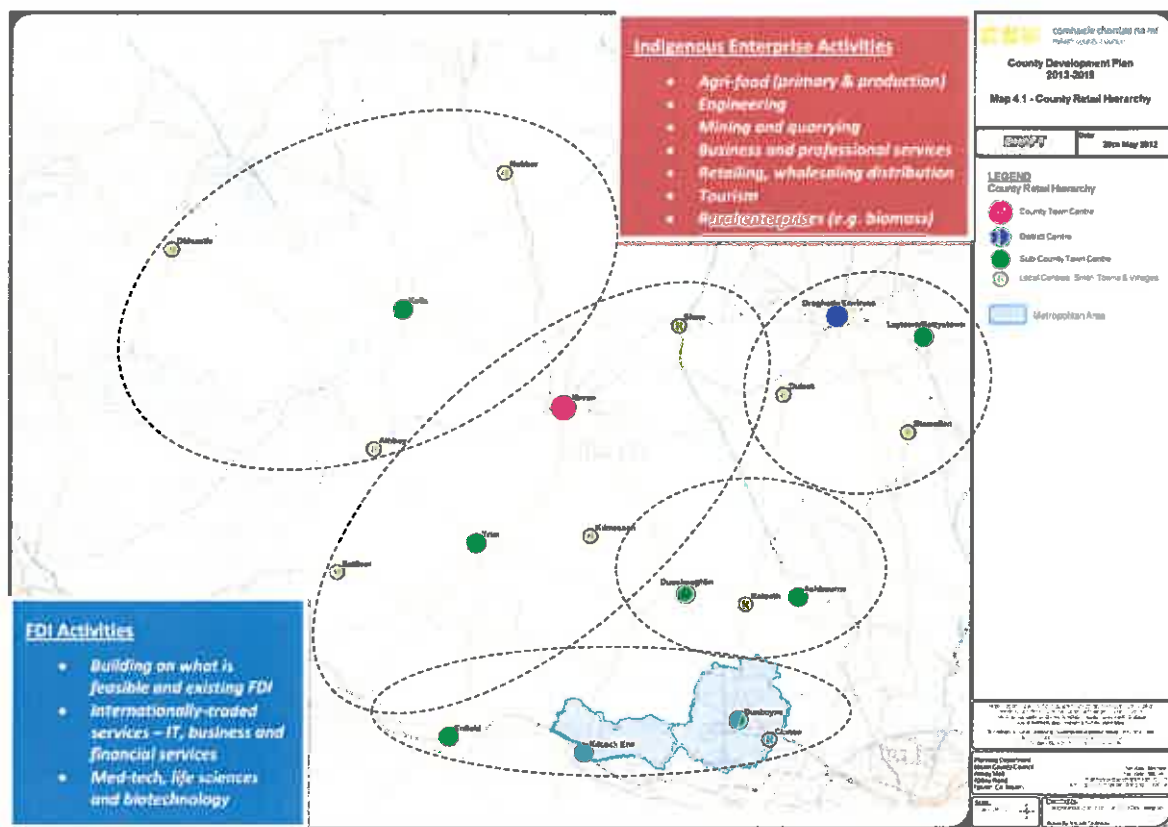
Relevant to this study in high-level economic strategy terms are the presentations and discussions that took place at the IBEC (Irish Business and Employers Confederation) Leaders Conference at the National Convention Centre on 27 March 2018 (Dr. McCloughan was in attendance as a guest of IBEC Chief Executive Officer Danny McCoy). In his address to the gathering, Mr. McCoy observed that Ireland has become an important *"intellectual resource economy"*, built upon skills and talent, which the country has created itself and imported from abroad (both are interlinked). Moreover, unlike other resources, such as oil, skills/talent are renewable. However, to replenish Ireland's key economic resource requires careful planning and State capital spending, where McCoy highlighted the importance of education and training, high-speed broadband and housing (skilled workers need places to live close to where they work at affordable prices).

Key Employment Centres in County Meath and Key Economic Sectors

The map in Figure 1 below illustrates (1) the main employment centres in County Meath and (2) the key economic sectors targeted for employment growth during the lifetime of the Economic Development Strategy, namely to 2022. The economic sectors are broken into those in which indigenous or Irish-owned enterprises predominate and those in which FDI or foreign-owned firms are active.

Of particular interest for this study is East Meath, where the main employment centres in the map (based on the County Retail Hierarchy of the Meath CDP 2013-2019) are: (1) Drogheda (specifically the Meath environs of Drogheda, within which is the Drogheda Southern Environs Local Area Plan (LAP) area); (2) Laytown/Bettystown (now Laytown-Bettystown-Mornington-Donacarney, which in Census 2016 had a population of almost 12,000, making it the third largest settlement in the County, after Navan and Ashbourne); (3) Duleek, the environs of which include Irish Cement and Indaver, and Duleek Business Park); and (4) Stamullen, where the City North Hotel and Business Campus is growing. These are key employment centres for which the proposed residential development will support.

Figure 1: Map showing the Main Employment Centres and Key Economic Sectors Targeted for Growth in the Economic Development Strategy for County Meath 2014-2022



Source: Economic Development Strategy for County Meath 2014-2022 (supra footnote 3).

Noteworthy about the East Meath employment centres illustrated in the map above is that they are helping to achieve the FDI-Irish-owned enterprise development and sector composition envisaged in the Meath Economic Development Strategy. For example, the Drogheda Southern Environs LAP area is currently host to about 40% of all FDI employment in County Meath, where Coca-Cola International Services (Southgate Centre) and IFS State Street (Drogheda IDA Business and Technology Park) are active in financial services and IT ('fintech'), and the City North Business Campus is home to a number of knowledge-oriented/innovation-intensive Irish-owned enterprises in life sciences and environmental activities, *inter alia*. There is also significant interest in the East Meath area, which could result in 1,500 or even more additional persons at work in that part of the County by 2026, which would be a 'game-changer' for the whole County, and the Eastern SPA within the EMRA Region.

It is also important to note that Drogheda ranks at the top of the Economic Hierarchy in the Meath CDP, along with Navan (the County Town). Of all the main settlements in County Meath, the Drogheda Southern Environs LAP area witnessed the strongest employment growth (proportionately) during 2011-2016 – the details are outlined below. Drogheda also features prominently in the 'National Planning Framework (Ireland 2040) as part of Drogheda-Dundalk-Newry within the Dublin-Belfast Corridor.

Progress to Date on the Target of 7,500 Extra Jobs in County Meath by 2022

The 38,822 persons at work in County Meath in the baseline year (2011) comprised of (a) 28,449 people both living and working in the County and 10,373 people commuting to work in Meath from elsewhere (inbound commuters). In 2016 both categories increased on the 2011 figures, with particularly strong growth observed in the inbound commuters (14.2%). The growth in the number of inbound commuters is also positive for illustrating the growth in higher quality jobs within the County (people living elsewhere tend to be prepared to travel longer for better paid jobs). But a proportion of the growing inbound commuters also choose to relocate their place of residence to Meath, particularly where the housing is high quality and competitive. Such demand for housing in East Meath, where employment has been growing and set to continue to increase, would be served by the proposed new residential development in Gormanstown. Overall, the total number of persons at work within Meath grew between 2011 and 2016 by 2,935 or almost 8%.⁴

Table 1: Persons at Work within County Meath in 2011 and 2016

Categories of Persons at Work	Persons at Work			
	Census Year		Change 2011-2016	
	2011	2016	Absolute	%
1. Working and Living in County Meath	28,449	29,909	1,460	5.1%
2. Working in County Meath and Living Elsewhere - Inbound Commuters	10,373	11,848	1,475	14.2%
Total Working in County Meath (1+2)	38,822	41,757	2,935	7.6%

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

Note: Persons at work refers to persons in fixed/known location employment.

⁴ The figures in Table 1 are based on analysis of data from POWSCAR 2011 and 2016. POWSCAR is short for Place of Work, School or College Census of Anonymised Records and has been conducted as part of the Census of Population in recent times. The POWSCAR data are not publicly available; yet they provide the most detailed data at local authority level, and at lower geographical disaggregation, on persons at work in Ireland.

At the rate of employment growth observed between 2011 and 2016, is the headline target of 7,500 extra jobs on the 2011 baseline figure of 38,822 on course to be met by 2022 (i.e. 46,322 in 2022)?

The average annual rate of growth in the number of persons at work in County Meath during 2011-2016 was 1.47%. If this growth rate were to continue, the number of jobs in Meath would be 45,573 in 2022, an increase of 6,751 on the baseline 2011 figure. To obtain the 7,500 extra jobs would necessitate a higher average annual growth rate of 1.74% in the remainder of the period (i.e. 2016-2022).

PMCA considers that the targeted 7,500 extra persons at work in County Meath can be met by 2022. This is because the recent employment wins for Meath, since the launch of the Economic Strategy in 2015, are not yet captured in the CSO POWSCAR data. These significant wins (FDI firms) include the jobs announced by Facebook, Aramark (Avoca) and Shire, which together (750 new jobs) would bring the number of persons at work in the County to just over the targeted level by 2022, namely the 46,322.

In addition to these job announcements are other inward investment projects in the pipeline. These include plans by Navan native and UK-based entrepreneur Mr. Noel Moran to create up to 800 new jobs in fintech in the IDA Business and Technology Park in Navan;⁵ and in the Meath environs of Drogheda the proposal to deliver a major new business campus (connected with the railway line, thus to Gormanstown) with the capacity to create 1,500 new jobs in fintech/e-payments and other professional services.

A little to the south of the Drogheda Southern Environs LAP area, at City North Business Campus, the developers there have ambitious plans to more than double the workspace footprint in the next few years.

It is important to note that these new employment developments and pipeline jobs for the County are being driven by entrepreneurs and investors with a proven track record of employment delivery in Meath and/or elsewhere.

When all things are considered, PMCA anticipates that the targeted uplift of 7,500 in the number of persons at work in Meath between 2011 and 2022 will be exceeded by the latter year. East Meath will be important in this regard and the proposed new housing development in Gormanstown will help to support the economic dividend by delivering more living space to accommodate the new jobs.

Growth of the Greater Drogheda/East Meath Area in Fintech/E-Payments

There are certain drivers for the investor interest in establishing in the East Meath area, including its favourable location in the heart of the M1 Corridor, its proximity to major national infrastructure in the form of Dublin Airport and Dublin Port, the latter being an important consideration for executives of FDI companies, and the availability of skills locally and within an hour's drive-time of the area, where it is estimated by IDA Ireland that more than 1.5 million of working age reside.

Drogheda (both the Louth and Meath parts of this, the largest town in Ireland) is carving out an important niche as a competitive location for fintech and e-payments. In addition to Coca-Cola International Services and IFS State Street, both operating in the Drogheda Southern Environs LAP area (in County Meath), the Louth part of Drogheda is host to two other FDI companies active in fintech, namely Kellton Tech (home country India and operating from the successful Mill Enterprise Centre, which is at capacity) and Yapstone Europe, which recently moved to the M1 Retail Park in Drogheda, reflecting the strong employment growth experienced by the enterprise. In addition, the Mill is also home to Irish-owned Aphix Software, established in 2017.

⁵ See, for example, *The Irish Times* article 'Entrepreneur aims to create up to 800 jobs in Navan' (5 May 2017) (accessible [here](#)).

Further up the M1 Corridor, in Dundalk, are more fintech companies, including PayPal (one of the largest companies of its kind in the State). There are more fintech companies in Newry – e.g. First Derivatives.⁶

Serving to promote the emerging fintech/payments cluster in the M1 Corridor (particularly in the out-of-Dublin part of the Corridor, including Drogheda and Dundalk, in Louth and Meath) is the M1 Payments Corridor (M1PC) Steering Group, which is helping to drive employment in this strategically important sector (Box 1 below). Initiatives such as this are important to giving momentum to the cluster, which has been recognised in the Border Region Action Plan for Jobs (North East/North West), which contains a Key Action to develop the fintech sector in the north-east/M1 Corridor (available [here](#)).

Box 1: The M1 Payments Corridor (M1PC) Initiative

The M1PC Steering Group championing the fintech sector in the NE has been in operation since 2015, at the time of the launch of Ireland's strategy for developing international financial services (IFS2020). Led by the Mill Enterprise Centre, the Steering Group's industry partners include:

- Payments and international financial services companies (FDI and indigenous) PayPal, Vesta, Yapstone, IFS State Street, Coca-Cola International Services, Aphix Software and Kellton Tech.
- Academic partners Dublin City University (DCU) and Dundalk Institute of Technology (DkIT), which have significant expertise in the area of interest, including the Irish Centre for Cloud Computing and Commerce (IC⁴) and the Financial Mathematics Computation Cluster (FMC²) (both at DCU), the Regional Development Centre at DkIT and the DCU-DkIT Graduate School, an important resource in skills provision for the region.
- State agency partners Enterprise Ireland and IDA Ireland.

The activities of the M1PC to date have included:

- National Payments Conferences 2015, 2016, 2017 (at the City North Hotel).
- E-payments networking events (hosted at the Mill).
- Payments CoderDojo.
- Seminars and training – for example, preparing for the General Data Protection Regulation of the EU (given in 2017).

The M1PC is represented on the following relevant stakeholder bodies.

Firstly, the Fintech & Payments Association of Ireland (FPAI), which represents fintech and payments businesses in Ireland to develop the regulatory, commercial and community ecosystem in which they operate. The M1PC is represented on the national Payments Working Group of the FPAI contributing to the national engagement on the IFS2020 and other aspects of payments systems and policies. The FPAI and the M1PC Steering Group have mutually aligned incentives and objectives to promote regional e-commerce and e-payments activities. The M1PC Steering Group, as a regional promoter, is today considered as a model for other regional collaborations by the FPAI.

Secondly, Fastrack to IT (FIT) is an industry-led initiative which works in close collaboration with Government Departments and national education and training agencies, local development organisations and a host of community-based organisations. FIT's mission is to promote an inclusive smart economy by creating a fast track to marketable technical skills for those at risk of long-term unemployment (out of work for a year or more). The M1PC is represented on the national board of FIT and is currently working on a skills assessment audit for the north-east region designed to create a knowledge base on current skills and skill gaps within the payments industry, to enable the growth of the sector in the coming years.

The website of the M1PC is accessible [here](#). A video outlining the ambition of the initiative can be found [here](#).

Source: The Mill Enterprise Centre, Drogheda; PMCA Economic Consulting research.

⁶ Illustration of the growth in fintech/payments in the greater Drogheda area in Meath and Louth is the expansion of Yapstone in a short space of time. When it entered the Mill in 2014, it employed 10 people, then grew to 25 before moving to larger premises at the M1 Retail Park in the town, employing 120. It envisages employing 200 in Drogheda by 2022 (more information on this is available [here](#)).

Population Changes in the Study Area of Interest

Population growth in the greater Drogheda area has been strong over the past decade, especially in the Meath parts. The proposed residential development in Gormanstown will help to meet the growing demand for housing and will also help to support the significant employment growth underway and anticipated to come on stream in the East Meath area in the coming years.

To look in more detail at the extent of the population growth (housing demand), we first delineate the greater Drogheda area, which reflects the 'Economic Strategy for the Greater Drogheda Area' (March 2009) and the 'Study of the Economic Potential of M1 Corridor' (January 2010) (Dr. Pat McCloughan contributed to both studies when based at Indecon in the 2000s).

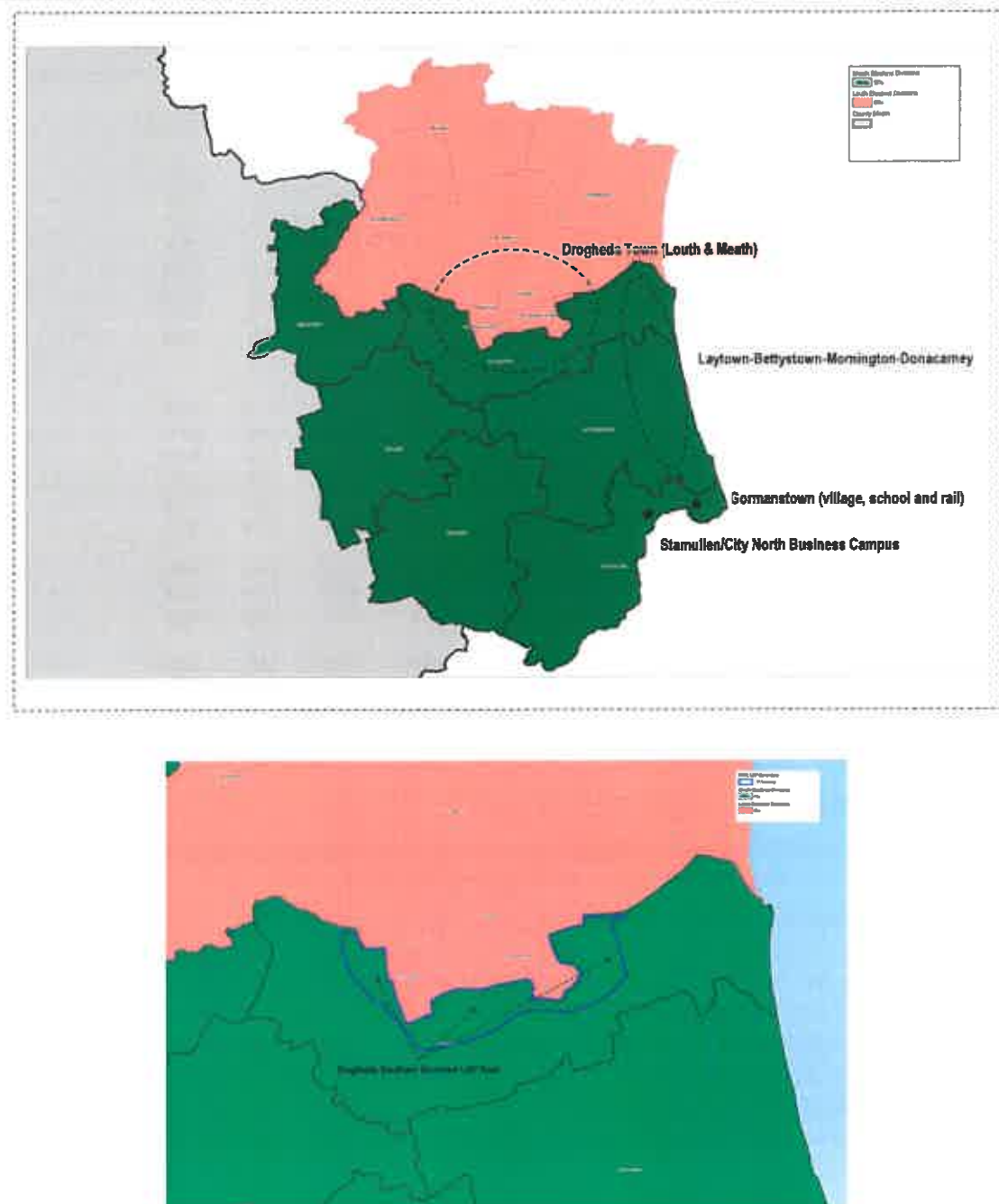
The map in the top panel of Figure 1 below shows the EDs making up the greater Drogheda/East Meath (Louth and Meath). That map also indicates Drogheda Town (straddling both Louth and Meath), the Laytown-Bettystown-Mornington-Donacarney settlement along the East Meath coast and the locations of Gormanstown and Stamullen/City North Business Campus, significant here as being among the main employment locations of the area of interest (along with Drogheda and Laytown-Bettystown-Mornington-Donacarney).

In the top panel map, the EDs in Louth (in pink) together make up the Drogheda Local Electoral Area (LEA); while in County Meath the EDs of St. Mary's, Mellifont, Duleek and Julianstown are part of the Laytown-Bettystown LEA and the EDs of Ardcath and Stamullin are part of the Ashbourne LEA in Meath (the Meath EDs are in green).⁷

The map in the bottom panel of Figure 1 shows the delineation of the Drogheda Southern Environs LAP area in County Meath. The LAP area is part of the St. Mary's ED in Meath (with the St. Mary's ED occurring in Louth as well as Meath).

⁷ A map showing all of the LEAs, and EDs therein, in both Counties Louth and Meath is presented in Figure A4 (p. 20) and helps to illustrate the wider geographical context of the area of interest. There is often confusion with the spelling of Stamullin/Stamullen. Following the convention of the CSO and others, the ED is spelled 'Stamullin' and the settlement/village 'Stamullen' in this report.

Figure 2: Map Illustrating the Electoral Divisions (EDs) of the Greater Drogheda/East Meath Area in which the Proposed Residential Development in Gormanstown would be Located (Top Panel) with Detail of the Drogheda Southern Environs LAP Area in County Meath (Bottom Panel)



Source: Meath County Council; PMCA Economic Consulting.

Analysis of population changes in the area of interest is given in Table 2, where the facts on each ED are shown. The whole area in Louth and Meath grew by almost 20% during 2006-2016, within which the Meath EDs together grew by nearly 26% compared with the 15% growth of the Louth EDs. The figures for Counties Louth and Meath, and the State, are also shown at the bottom of the table.

Table 2: Population Changes in the Greater Drogheda/East Meath Area (2006-2016)

Hinterland Delineation	Population Level			Population Change (%)		
	2006	2011	2016	2006-2011	2011-2016	2006-2016
Louth						
1. Fair Gate	9,783	9,806	10,424	0.2%	6.3%	6.6%
2. St. Laurence Gate	3,801	4,004	4,068	5.3%	1.6%	7.0%
3. West Gate	5,899	6,042	6,305	2.4%	4.4%	6.9%
4. St. Mary's (Part)	6,030	6,563	6,859	8.8%	4.5%	13.7%
5. St. Peter's	7,482	9,151	9,721	22.3%	6.2%	29.9%
6. Monasterboice	1,164	1,342	1,373	15.3%	2.3%	18.0%
7. Termonfeckin	2,575	3,294	3,545	27.9%	7.6%	37.7%
8. Mullary	1,528	1,723	1,757	12.8%	2.0%	15.0%
Meath						
1. St. Mary's (Part)	9,044	10,769	11,864	19.1%	10.2%	31.2%
2. Julianstown	8,289	9,606	10,176	15.9%	5.9%	22.8%
3. Stamullin	3,844	4,696	5,009	22.2%	6.7%	30.3%
4. Ardcaith	1,873	1,911	1,949	2.0%	2.0%	4.1%
5. Duleek	4,366	5,177	5,565	18.6%	7.5%	27.5%
6. Mellifont	523	561	541	7.3%	-3.6%	3.4%
Total Hinterland Area	66,201	74,545	79,156	12.8%	6.0%	19.6%
Total Louth Part	38,262	41,925	44,052	9.6%	5.1%	15.1%
Total Meath Part	27,939	32,720	35,104	17.1%	7.3%	25.6%
County Meath	162,831	184,135	195,044	13.1%	5.9%	19.8%
County Louth	111,267	122,897	128,884	10.5%	4.9%	15.8%
State	4,239,848	4,588,252	4,761,865	8.2%	3.8%	12.3%

Source: CSO Census of Population 2006, 2011 and 2016 data, PMCA Economic Consulting analysis.

Upward Pressure on House Prices

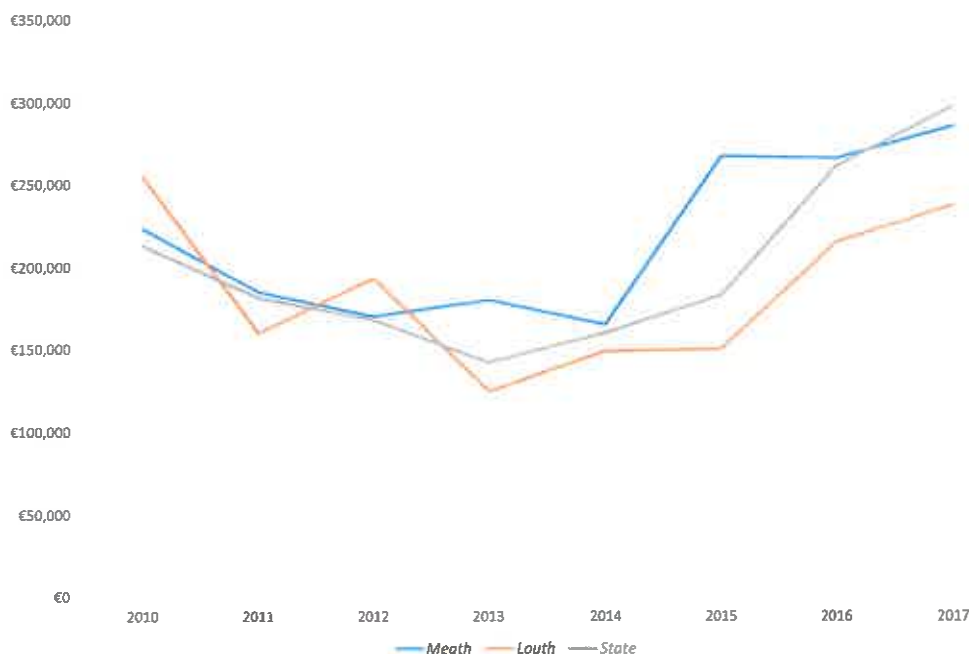
The steep population increases shown in Table 2 above, and the increasing investor interest, have meant that house prices have risen sharply in the area of interest and Meath overall.

The upward pressure on residential property prices in recent years reflects the collapse of the housing market and the construction sector in 2008, when the financial crisis proved severe for Ireland. While the national economy has recovered strongly since 2011, not least in Meath, the construction sector has remained subdued and the resulting excess demand for housing has pushed up house prices (and rents). In other words, there remains a substantial shortage of residential properties, which now need to catch with the strong demand emanating from the significant growth in employment in recent years – employment is the main driver of property prices. The affordability of housing has become a major issue for policy and most of the need for new housing exists in the Greater Dublin Area, which includes Meath.⁸

⁸ This view is shared by other economists, including at the ESRI (Economic and Social Research Institute). See, for example, the ESRI Research Note 'Housing Supply and House Price Trends: A County Level Analysis' (2016, [here](#)).

The graph below shows the rapid growth in house prices since the economic recovery began to be felt nationally (from around 2013). The graph also shows that in 2017 residential property prices were much higher in Meath than in Louth (the figures for the State are influenced to a large extent by Dublin).

Figure 3: Average Sale Price (€) in Residential Property Transactions in Counties Meath, Louth and All Counties in the State (2011-2017)



Source: CSO data on residential dwelling property transactions; PMCA Economic Consulting analysis.

Note: CSO data pertain to all buyer types in respect of transactions executed for all dwelling types. Median prices.

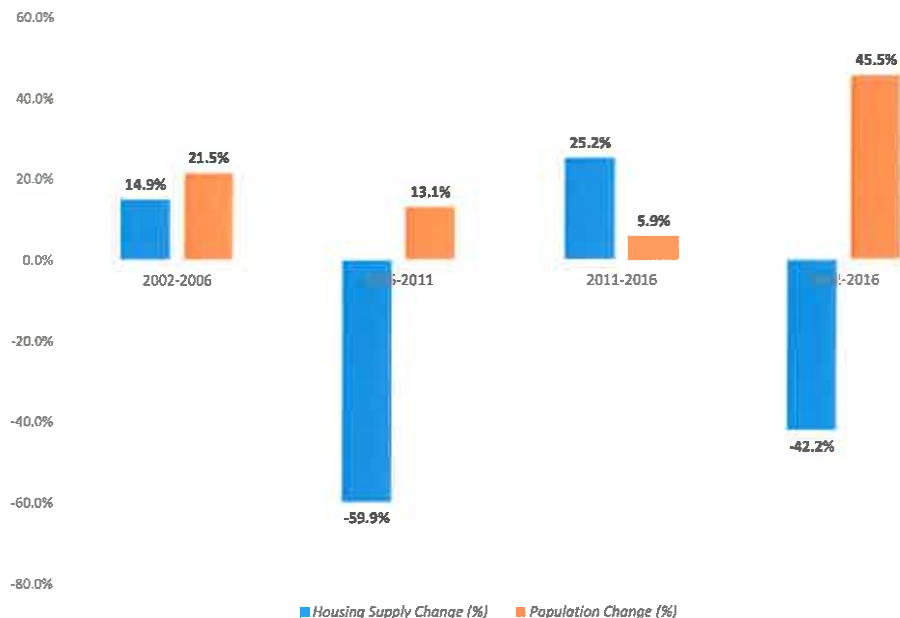
The next graph focuses on County Meath by comparing the percentage rate of change in housing supply (based on planning permissions granted) with that in population in sub-periods between 2002 and 2016.

2002 represents the transition from the sustainable Celtic Tiger period (mid-1990s to that year, when economic growth was based on exports and investment) to the unsustainable property bubble, which eventually resulted in the crash of 2008. Between 2002 and 2006, property prices were escalating rapidly: even though house completions were growing strongly, population and demand were growing by even more, and property prices rose rapidly as a result, driven by inter-bank credit and a weak regulation.⁹ Then, during 2006 and 2011, the property market collapsed. Between 2011 and 2016, while there occurred growth in house completions (in the past couple of years), the extent of the crash meant that there continues to exist a huge undersupply of residential units in Ireland, particularly in Meath, where employment and population growth are comparably strong.

⁹ Dr. Pat McCloughan acted as external expert economist advisor to the Joint Oireachtas Committee (TDs and Senators) that inquired into the nature, causes and consequences of the banking crisis in Ireland during 2014-2015.

The gap between demand and supply, which illustrates the current housing need, is illustrated in the last two bars of the chart in Figure 4, where it is seen that during 2002-2016 the population of County Meath grew very strongly by 46% but on the other hand housing supply (on the basis of planning permissions granted) contracted by nearly the same amount (42%).

Figure 4: Changes in Housing Supply and Population in County Meath (2002-2016)

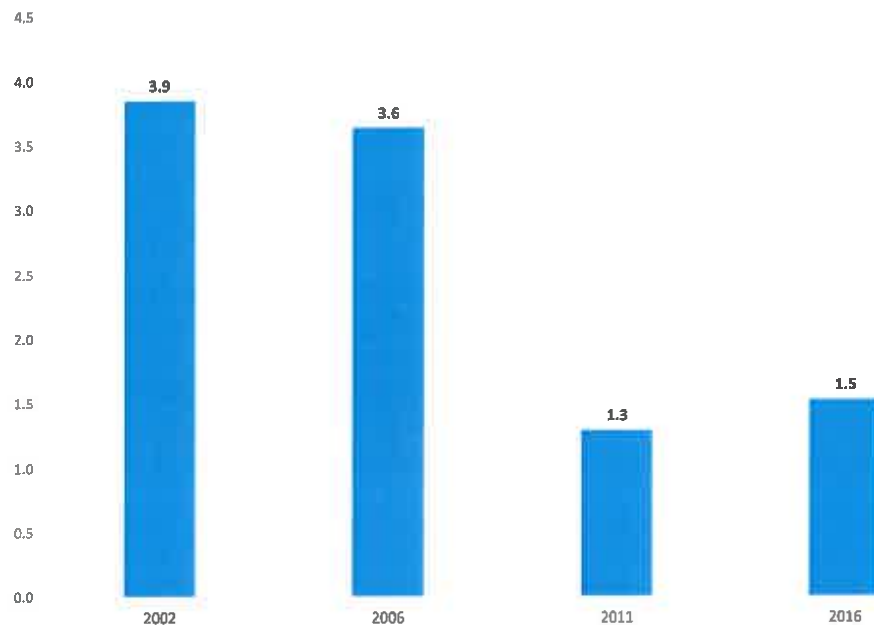


Source: CSO data on planning permissions granted and population levels; PMCA Economic Consulting analysis.

Note: Housing supply data pertain to planning permissions granted (number) with housing comprising both one-off houses and multi-development houses.

Another way to see the size and extent of the residential property shortage facing the country at the present time is to chart the development of housing supply (based on planning permissions granted) per thousand of population since 2002.

Under 'normal' circumstances, planning permissions granted per thousand of population would be in the range 4-6 (or more) but this has not been so in County Meath for over a decade, where the extent of under-supply of residential units is marked in 2011 and 2016 – although there has been some gain between 2011 and 2016, there is still a long way to go.

Figure 5: Housing Supply per Thousand of Population in County Meath (2002-2016)

Source: CSO data on planning permissions granted and population levels; PMCA Economic Consulting analysis.

Note: Housing supply data pertain to planning permissions granted (number) with housing comprising both one-off houses and multi-development houses.

Clearly there is a need for more residential units in County Meath, as demonstrated by the last three exhibits, where the excess demand has resulted in rapidly rising prices in the County, with the level in 2017 appreciably above that in Louth, reflecting the demand in Meath. The facts on residential property prices and housing supply versus population above help to motivate the rationale for the proposed developments in Gormanstown.

The relevance of the proposed development is reinforced further when we consider the importance of supporting the targeted employment growth in the East Meath area under the Meath Economic Development Strategy.

We next turn to the recent trends in employment in that part of the County and the likely uplift in employment there that can be achieved in the next 3-5 years, based on the recent trend and employment proposals in the planning pipeline.

The Economic Significance of the Meath Environs of Drogheda and East Meath Area in the M1 Dublin-Belfast Corridor

Shown in Table 3 below are the numbers of persons at work in County Meath in 2011 and 2016, along with the corresponding information for the main settlements within the County, including the key employment centres of the East Meath area. As well as showing the employment changes between 2011 and 2016 (in absolute and percentage terms), the projected levels of employment are also given, reflecting announced/planned investments in the pipeline.

Beginning with the facts for 2011 and 2016, the strongest employment growth in County Meath between these years took place in the Drogheda Southern Environs LAP area, where the number of persons at work within the LAP area grew by 44%. This employment growth represented the opening of Southgate Shopping Centre, including the establishment of Coca-Cola International Services, which relocated from the M1 Retail Park on the other side of Drogheda. Today, Coca-Cola International Services employs in the region of 300 persons on a permanent full-time basis in high quality finance and IT-related jobs. Elsewhere in the Drogheda Southern Environs LAP area, there was growth in employment in IFS State Street (financial services) and in Boyne Valley's major distribution hub and operations centre. New establishments in the area have included Drogheda Retail Park, within which is Beacon Dialysis Unit and the New Harvest Craft Brewery (see Figure A5, p. 21, showing successful economic projects in the LAP area in recent years).

Within the Drogheda Southern Environs LAP area are plans to fill the remaining office space at Southgate (2018) and the aforementioned new business campus, with the potential to create 1,500 high quality jobs close by, which will be a game-changer for East Meath and the whole County. These are reflected in the projections to 2026, as are the ambitious plans to more than double the workspace capacity at City North Business Campus and the recent positive developments for Laytown-Bettystown-Mornington-Donacarney, which include the recent acquisition of the Bettystown Centre development (from NAMA).

Table 3: Persons at Work in County Meath and Selected Settlements (including Key Employment Centres in the East Meath Area) (2011, 2016 and Projections in 2021 and 2026)

County and Settlement within County	Persons at Work		Change (2011-2016)		Projected Employment	
	2011	2016	Absolute	%	2021	2026
Meath	38,822	41,757	2,935	7.6%	46,933	52,731
Navan	9,026	8,970	-56	-0.6%	9,919	10,714
Trim	2,138	2,500	362	16.9%	2,875	3,306
Kells	1,386	1,543	157	11.3%	1,697	1,867
Ashbourne	1,439	1,963	524	36.4%	2,356	2,827
Dunshaughlin	1,029	998	-31	-3.0%	1,048	1,100
Ratbath	864	922	58	6.7%	984	1,550
Dunboyne	1,163	1,211	48	4.1%	2,011	2,094
Clonee	299	268	-31	-10.4%	288	310
East Meath						
Drogheda Southern Environs LAP	845	1,216	371	43.9%	1,459	2,959
Laytown-Bettystown-Mornington-Donacarney	804	772	-32	-4.0%	930	1,001
City North Business Campus	250	500	250	100.0%	750	1,000

Source: CSO POWSCAR 2011 and 2016 data (supra footnote 4); announced and planned investments; PMCA Economic Consulting analysis.

Note: The figures for 2011 and 2016 are based on POWSCAR 2011 and 2016, apart from the figures for City North Business Campus, which are estimated by PMCA based on local knowledge.

When all announced and planned investments are considered, employment growth in the East Meath area is set to be very significant in the coming years. PMCA estimates that an additional c. 2,500 persons at work will be added to the employment profile of this part of County Meath by 2026, reflecting the aforementioned developments in the Drogheda Southern Environs LAP area, Laytown-Bettystown-Mornington-Donacarney and City North Business Campus. By this time, the economic potential of this strategically important part of the M1 Corridor in East Meath will have gained significant momentum, on the back of the strong employment growth witnessed during 2011-2016, as evident in Table 3.

Who are likely to fill the new jobs in East Meath? It will be a combination of the following worker types:

- People who both live and work in the East Meath area.
- Inbound commuters – people living outside the area but commuting into the area for work.
- Outbound commuters – people who currently work in the area but work outside their area of residence, typically in Dublin.

For example, of the 1,216 persons at work in the Drogheda Southern Environs LAP area in 2016, 455 were living in the area and elsewhere in County Meath and most (761) were inbound commuters – many living in Dublin and working in the well-paid jobs at IFS State Street and Coca-Cola International Services. But in addition, 2,245 people living in the LAP area were commuting outwards to work, mostly in the capital.

PMCA believes that many of the projected new jobs in the East Meath area between now and 2026 will be filled by people moving into the area, who will demand high quality new houses. The proposed residential development in Gormanstown will be important in accommodating the wider economic growth envisaged in the East Meath area.

The rest of analysis in Table 3 above shows that strong employment growth is also envisaged in the following settlements in Meath:

- Navan, where it is projected that there will be an uplift in persons at work of 1,744 during 2016-2026, reflecting further growth of the economic base of the town, including the aforementioned fintech development by Navan native Noel Moran, where the 800 new jobs would be created by 2026 (*supra* footnote 5).
- Dunboyne, where the new employment due to the Facebook, Aramark and Shire investments, which have already been announced, will see 750 new jobs (likely by 2021) (the announcements have been made in recent years, since the launch of the Economic Development Strategy in 2015).
- Rataoth, where there are other economic development plans in the pipeline too.¹⁰

Finally, turning to County Meath as a whole, it is projected that the number of persons at work will reach 46,933 in 2021, an increase of 8,111 on the 2011, meaning that the targeted uplift of jobs in the County (7,500) is expected to be met ahead of schedule. In view of the various announcements and pipeline investments around the County at the present time, it is envisaged that the number of persons at work could exceed 52,000 by 2026 (and of course the pipeline is not exhaustive of what could occur between now and then). The positive employment outlook further emphasises the importance of the proposed development at Gormanstown.

Of course there are also risks – Brexit, rising interest rates, higher fuel and energy costs, not to mention the possibility of less FDI into Ireland as a result of possible corporate tax reforms. But these risks may also have an upside – for example, the opportunities for more inward investment and high quality jobs coming into Ireland from the UK as a result of Brexit was a salient ‘take-away’ from the aforementioned IBEC Leaders Conference 2018.

¹⁰ The investments in the pipeline helping to inform the projections shown in Table 3 are not exhaustive of all possibilities in County Meath over the next ten years.

Conclusions

The overall conclusion of this study is that the proposed residential development in Gormanstown, Co. Meath, have a justified rationale on the following grounds:

- The need for additional housing in East Meath, which has seen some of the strongest population growth in Ireland over the past decade, resulting in strong housing demand, giving the strength of the economic recovery where the country is moving rapidly towards full employment (where the unemployment rate is expected to fall to 4.5-5% in the next year).
- The requirement to support the strong economic development occurring in the East Meath area, where the Drogheda Southern Environs LAP area in Meath has proved to be the fastest growing employment centre in County Meath during 2011-2016. Other parts of the East Meath area are also noteworthy in regard to meeting the goal of more persons at work *within* County Meath, for example City North Hotel and Business Campus, which currently employs in the region of 500.
- Further to the preceding justification for the proposed developments is the planned employment growth in the East Meath area over the coming years where approved economic development projects and/or investments in the pipeline could result in an additional c. 2,500 persons at work in this part of County Meath by 2026, in high quality, knowledge-oriented jobs, as targeted by the Economic Development Strategy for Meath 2014-2022. Many of these new jobs would be in or close to the Drogheda Southern Environs LAP area in County Meath, where one of the major proposals includes connecting a new high quality business campus with the rail line, which would thus be connected with the railway station at Gormanstown, which would benefit the people moving into the proposed new residential development for the village (Gormanstown College would also benefit from the proposed developments).

The economic potential of the East Meath area in the heart of the M1 Dublin-Belfast Corridor is gaining momentum, judging by the employment growth to date and the investor interest/projects in the pipeline. To ensure the goal of the Economic Development Strategy for Meath of more people at work within the County working closer to where they live, new residential housing developments will be important, as an *economic asset* as well as serving to address the housing supply crisis.

Accordingly, Dr. McCloughan considers that the proposed new residential development constitutes a Strategic Housing Development aimed at accelerating the delivery of larger housing proposals and would be integral to facilitating the goal of facilitating more employment in County Meath, in accordance with the Economic Development Strategy for Meath, has been integrated (through Variation No. 3) into the Meath CDP 2013-2019 in May 2016 by unanimous decision of Meath County Council.



Dr. Pat McCloughan

Managing Director
PMCA Economic Consulting

11 December 2018

Annex of Supplementary Information

Figure A1: Location of Site (Circled in Black) making up the Proposed Residential Development in Gormanstown, Co. Meath



Source: Boyle Architects on behalf of the Project Developers.

Figure A2: Map of the New Eastern and Midland Regional Assembly Area (Left Panel) and the Three Strategic Plan Areas (SPAs) within the EMRA Region (Right Panel).

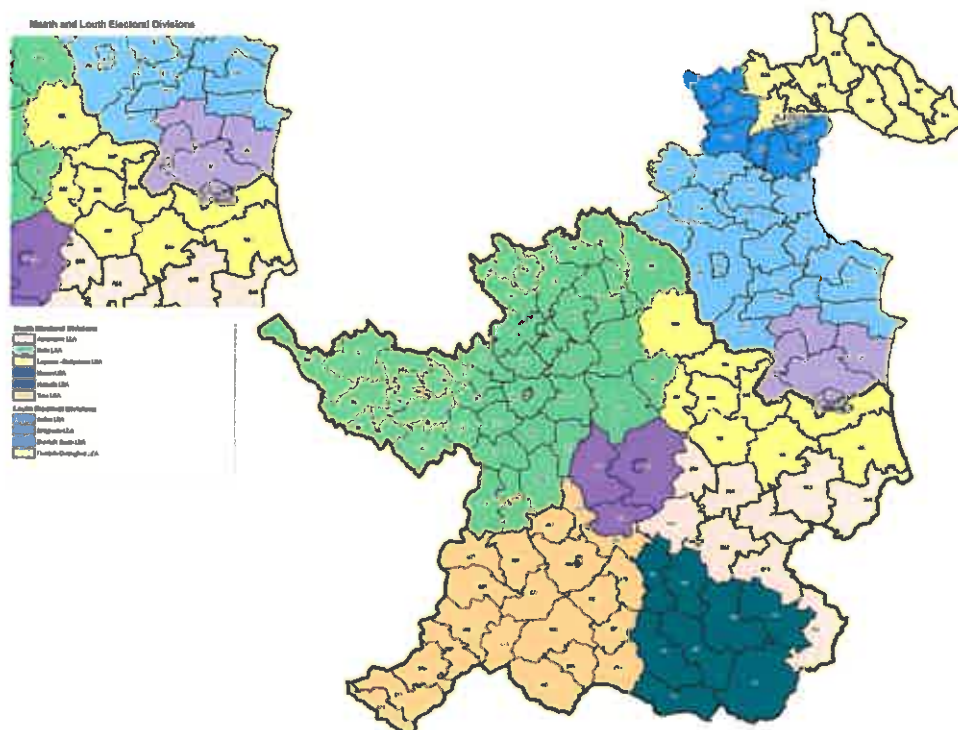
Configuration of the Regional Assemblies in Ireland



Source: EMRA website (accessible [here](#)).

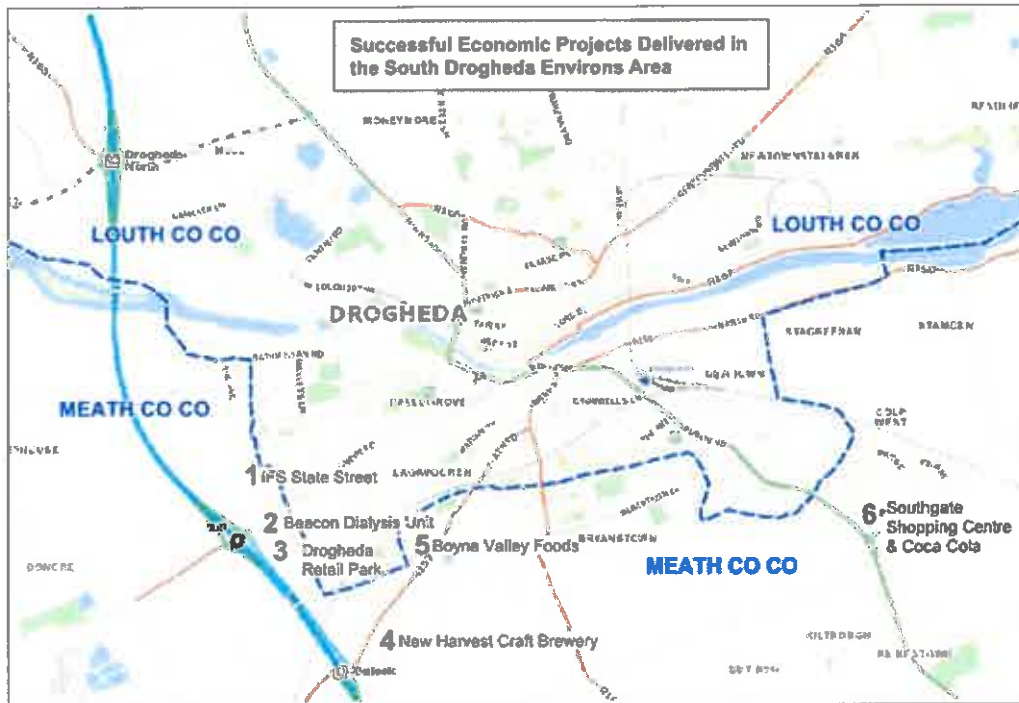
Figure A3: Local Newspaper Coverage of the 7,500 Extra Jobs Target *within* County Meath in or by 2022

Source: Meath Chronicle (17 January 2015).

Figure A4: Map Showing the EDs and LEAs of Counties Meath and Louth

Source: Meath County Council; PMCA Economic Consulting.

Figure A5: Map Showing Successful Economic Developments in the Drogheda Southern Environs LAP Area in Recent Years



Source: Meath County Council; PMCA Economic Consulting.

