MAYO: Sustaining jobs, Supporting growth & Winning investment

MAYO.IE

Colin Stutt consulting

Seán Ó'Riordáin AND ASSOCIATES

EXECUTIVE SUMMARY

(i) This Strategy has been prepared to enable Mayo County Council fulfill its economic development responsibilities. The Strategy provides the platform on which the Council can enhance the economic development potential of Mayo and will build upon the existing role the Council and the key economic development agencies in the County.

(ii) The key outcome of the Strategy will be the development of an investment friendly culture in the Council.

(iii) Most of the characteristics determining investment decisions by both local and international investors are driven by international and national policy developments so the extent to which Mayo can influence changes at local level will be restricted. Nonetheless those that do fall to the Council are critical in ensuring the County becomes a location of choice for investment.

(iv) Mayo has a number of locational advantages, including:

- an outstanding natural environment
- a high quality of life, and
- A strong sense of association and affiliation to the County by its residents and the 3.5 million members of the Mayo diaspora

(v) A significant but unknown reservoir of educated/skilled people is likely to be a large feature within the Mayo diaspora. There is a case for building a profile of these people and their interest in returning to Mayo to develop new opportunities or take up potential opportunities from on-going investment in the County.

(vi) Development of broadband/4G infrastructure has to be a priority if rural communities are to have any prospect of sustainable business development in the immediate future.

(vii) The potential to use the Diasporic Networks of the Council to open up new access points for investment development to create pipelines for IDA Ireland, Enterprise Ireland (EI) and Mayo County Council itself should be a focus for the Council in the immediate future.

(viii) Emerging sector development from a micro-enterprise perspective should focus on those sectors which underpin the quality of life in the County.

(ix) A sustained positive messaging about Mayo as the place to live, work, and invest in should be a hallmark of Council activities at home and abroad. Considerable progress is being made in regard to the re-branding of Mayo. This process should be advanced as quickly as possible to underpin the enhanced connection with the Mayo diaspora.

(x) It is recommended that the following apply:

01. The EIU continues to build capacity and knowledge within the Unit and to focus on delivering current priorities and projects which are extensive in their own right.

02. Building local economic development performance/capacity in Mayo County Council is now firmly embedded into the Corporate Plan 2015-2019. This priority is essential in the general re-configuration of the Council and therefore must be fully applied.

03. Local authority policies should be aligned to economic development priorities as a part of the renewalof local policies including planning, housing, development and transport (including development of Ireland West Airport Knock, the N5 and the Charlestown-Athenry rail line) should be rolled out over the life of this Investment Strategy.

04. Finalization of the re-branding of the County is an immediate priority.

05. The Council should prepare a diasporic development plan and within it the "Business Ask." The plan should target a focused number of locations in the UK and the US.

06. Limit marketing to likely fertile opportunities and people but begin drilling into the diaspora to determine on-going potential and opportunity.

07. Develop a shared service initiative with the IDA and EI to provide Mayo based support and information within the framework of the Graduate Recruitment Process currently underway through the Local Government Management Agency.

08. Establish client management arrangements with existing FDI and other Key Investors in the County to ensure their local needs are addressed appropriately.

09. Establish a "hand holding" package for new investors/people coming into the County so ease of access to local services such as schools, housing and leisure for these people is assured.

10. Above all the immediate need for broadband and 4G coverage is pressing and must be addressed.

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Road Map for Sustaining Jobs, Supporting Growth and Attracting Investment

01 INTRODUCTION

1.1 Mayo Economic Investment Unit (EIU) of Mayo County Council commissioned Seán Ó'Riordáin and Associates, in association with Colin Stutt Consulting, to complete an investment strategy for County Mayo. The Strategy sets out options for future investment in the County. It builds upon the supporting framework put in place by the Council through its forward development planning policies, the very high quality of life in the County and the much increased access, national and international, that is the result of the Council working with many stakeholders to deliver strategic infrastructure. The Strategy will serve as a roadmap for the Unit and the Council generally in its economic development role. The strategy has been set out in accordance with the Policy and Objectives of the County Development Plan, and The EU Birds and Habitats Directives and (iii) the 1976 Wildlife Act as Amended 2000.

It will facilitate the Council to work closely with the IDA and Enterprise Ireland as they deliver their respective mandates in the County and, more widely, it will provide the platform for the Council to meet its corporate objectives as the critical public service agency in Mayo.

1.2 The Strategy is required, under the terms of the request for quotes, to consider:

1) A preliminary assessment of recent global investment trends in Europe and Ireland

2) Mayo in relation to European benchmarks of incentives – access, infrastructure, education, competitiveness, access, etc.

3) Assessment of the international[1] potential offering for Mayo, based on the national legal and incentive frameworks, but also additional resources and support offered locally

4) A comprehensive profiling of international investment in Mayo (2014), their growth and current business life cycle stage

1 The initial focus of the Study was on international investment but as the work developed it was recommended that the focus should be on the capacity of Mayo as a location for investment to include international and indigenous investment.

5) The labour force skills and availability locally/regionally

6) Current physical infrastructure and technology development in place and under development in Mayo that will boost County competitiveness

7) Completion of a comprehensive SWOT analysis.

8) Potential markets and niche markets, and the respective promotion strategy per market

9) Recommendations on investment attraction methods and investment policies with a focus that should be placed on those countries with more financial outflows and main companies/ corporations investing in those sectors

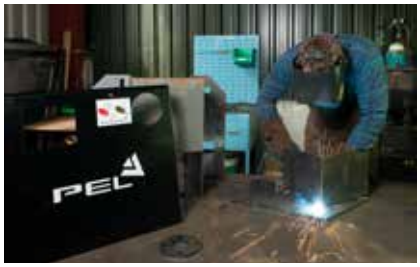
10) Recommendations on strategies that can be used to elevate Mayo for attracting international clients

11) Provide a database of the top 'Location Experts' (per sector/subsector or niche) that Mayo should target for investment promotion based on the strategy determined by the EIU

12) Provide a list of potential events (based in the strategic sectors and potential markets) that Mayo should participate in to boost our competitiveness and profile

13) Determine a set of key actions to engage with the Mayo diaspora internationally in the development and ongoing implementation of our Investment and Promotion Strategy

'The Strategy will serve as a roadmap for the Unit and the Council generally in its economic development role.'



02 CRITICAL EXPECTATIONS

2.1 Foreign Direct Investment (FDI) is a powerful force in developing global markets and in the economic development of many countries and regions. FDI is, however, highly cyclical, and while it continues in times of downturn as companies invest outside their home market to defend existing market positions and to reduce costs, it should not be seen as a single vehicle for underpinning the economic development of a location. Indigenous development plays a more substantive role and as such should be seen as a central feature of any investment strategy.

2.2 FDI is surprisingly complex to define and to measure, and different international bodies and national governments use slightly different measures which sometimes producing contradictory and conflicting findings. The World Bank, the United Nations Conference on Trade and Development (UNCTAD), the OECD and national statistical definitions all differ in detail in how they measure, monitor and report FDI, and a different approach is taken by a range of commercial organisations which report on FDI, such as the Financial Times and accountancy firm Ernst and Young (EY).

2.3 This Strategy acknowledges that the above factors are critical in developing an understanding of the dynamics behind investment decisions. Equally, as will be evident from what follows, FDI should not be seen as a single platform on which to develop a sustainable economy. The Strategy therefore also considers:

- Identify actions which will help influence location experts when identifying potential investment locations to think "Mayo"

- The recently published[2] Emerging Sectors Report to see how this complements current capacity of County to attract such investment, and whether there is a need to focus in on a limited number of sectors

- Capacity of County to meet the needs of investment sectors, current and potential

2 Emerging Sectors in Mayo, PMG Consult for Mayo EIU, 2014

- Capacity of the Council to underpin the existing mandates of the IDA and Enterprise Ireland (and in relation to Gaeltacht areas, Údarás na Gaeltachta). This includes the capacity of the Council to address issues arising for the investment sector in the County and whether there are any gaps perceptions of poor service delivery to the investment sectors already based in Mayo

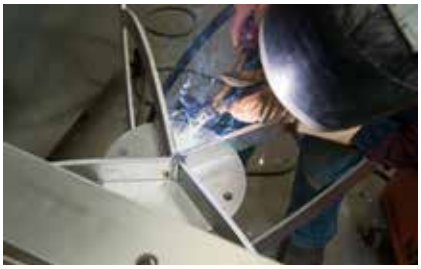
- The need for a consistent message and supporting story line on the benefits of investment in Mayo

- The need to develop up a "business ask" for the Mayo diaspora so a potential pipeline of ideas and possible investment proposals can be put in place for the enterprise agencies in regard to manufacturing and international traded services and for the LEO/Council for all other investment opportunities including tourism, and micro-enterprise investment

- The need to develop a roadmap of actions over the next three to five years which will complement the Council's Corporate Plan and service re-configuration. These actions must be practical, measurable and demonstrate the capacity of the Council to lead local economic initiatives in Mayo and to play a great role in attracting foreign investment into the County

- The need to identify any unnecessary local barriers/gaps to investment decisions which will complement the policy framework in the County

- The need to identify possible opportunities for innovation and innovating actions which will support the development of a positive investment environment in Mayo



'Foreign Direct Investment (FDI) is a powerful force in developing global markets and in the economic development of many countries and regions.'

03 METHODOLOGY

3.1 The development of the Strategy is based upon completion of comprehensive desk research which has allowed the consultants understand the current conditions for investment in Mayo. In addition, a comprehensive consultation process was used to underpin this understanding. The consultation process consisted of engaging with:

- **Private industry**
- **Business leaders in Mayo**
- **IDA Representatives**
- **Enterprise Ireland Representatives**
- **Western Development Commission**
- **Survey results from comprehensive business questionnaire issued in Mayo**
- **Strategic Policy Committee for Economic Development**
- **Senior Management within Mayo County Council**
- **Advice from experienced advisors within the sector**

This facilitated the completion of a SWOT Analysis which was then used to identify ideas fordevelopment into actions which will underpin the Council Vision and Mission Statement as set out in the draft Corporate Plan. These actions then informed the development of the overall strategy which was considered by the Council and its key stakeholders before its completion. The final strategy will be launched at a Mayo Meets business event in mid 2015.

The final adopted road map is based on four key pillars that will position Mayo as a key competitive location over the next five years.

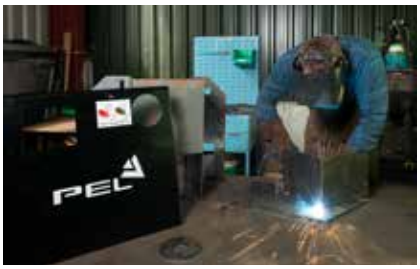
Mayo: Invest, Retention and Growth Strategy

4 Strategy Pillars

1. Business Attraction
2. Business Retention & Expansion
3. Investment Ready
4. PR, Communications & Marketing

04 KEY OUTCOMES

4.1 The key outcome from the strategy will be the creation of an investment friendly culture within the Council. This will underpin the role of the EIU and demonstrate the Council commitment to local economic development, as well as providing the environment in which Mayo can compete for, other, international investment. Underpinning this will be a series of practical actions to retain existing investment and deliver new investment into the County. Such investment opportunities will include those highlighted from the emerging sectors and digital plans recently developed by the Council and other opportunities that would underpin the general economic and investment environment in Mayo.

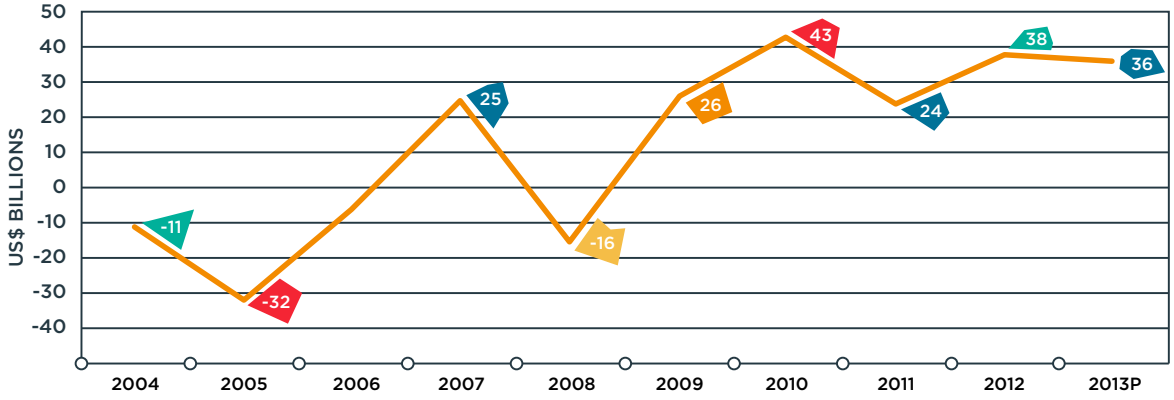


'Underpinning this will be a series of practical actions to retain existing investment and deliver new investment into the County.'

05 MAYO AND IRELAND IN RELATION TO EUROPEAN FDI BENCHMARKS

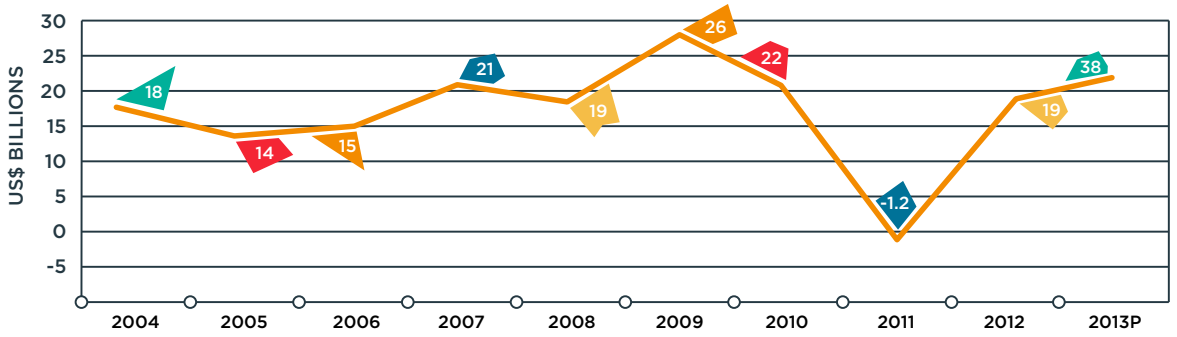
5.1 This Section first considers the experience of FDI in Ireland and then considers the implications of the analysis for Mayo. Ireland is a major player in inward FDI and a significant player in outward FDI. Using the OECD report referred to above, FDI inflows and outflows to Ireland are charted over the period 2004 to 2013 and the net annual inflow shown. Figure 1 shows the annual FDI inflows to Ireland over the period.

Figure 1: Annual FDI Inflows to Ireland 2004 – 2013 (Billion US$)



5.2 The chart shows quite a volatile picture with negative inflows in 2005, 2006 and 2008. These years will represent the repatriation of profits or equity by foreign owned companies in Ireland at a time of little new inward investment. However, from 2009 onward the net inflows are strongly positive. Figure 2 shows the net outflows from Ireland over the same period. Net outflows represent the net investment in other countries by companies domiciled in Ireland.

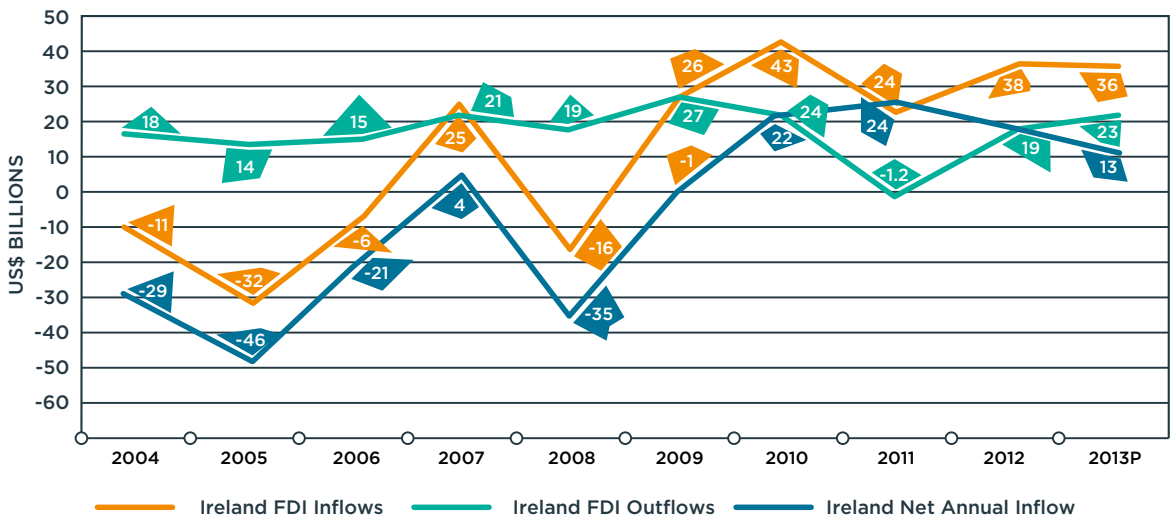
Figure 2: Annual FDI Outflows from Ireland 2004 – 2013 (Billion US$)



Net investment by Ireland-based companies in other countries was strongly positive in the period 2004 – 2010, peaking in 2009, but became marginally negative in 2011 before recovering strongly in 2012 and 2013.

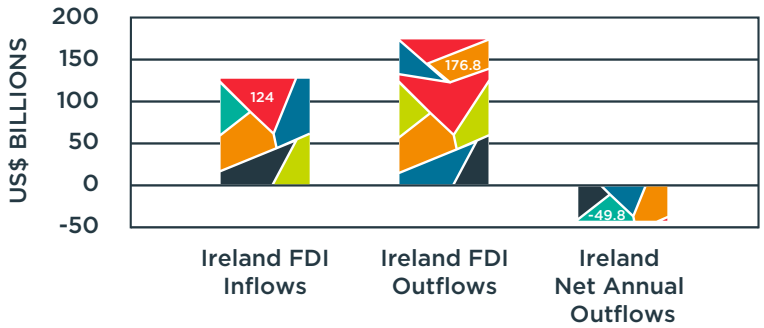
5.3 Finally, Figure 3 brings together the data to show the net position.

Figure 3: Balance of Ireland FDI Inflows and Outflows 2004 – 2013 (Billion US$)



The variations in the data are dominated by the FDI inflows, which are larger and more volatile than the outflows. **However, over the whole period 2004 – 2013, the somewhat surprising conclusion is that net investment by Irish companies** overseas exceeded net investment in Ireland by overseas companies, as shown in Figure 4.

Figure 4: Balance of FDI Inflows and Outflows 2004 – 2013 (US$ Billions)



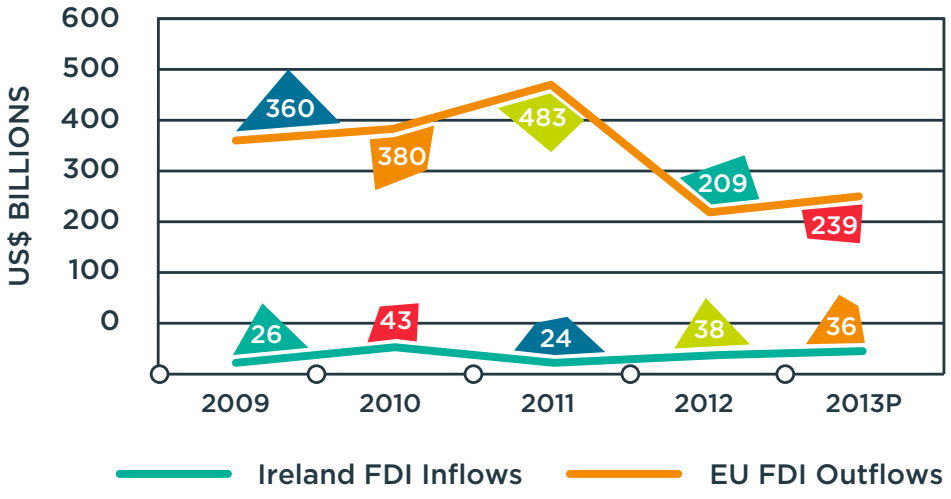
During the latter part of this period, Ireland captured an increasing share of a diminishing level of FDI inflow to the EU, as shown in Table 2.

Table 2: Ireland's Share of EU FDI Inflows 2009 – 2013 (Billion US$)

	2009	2010	2011	2012	2013P
Ireland FDI Inflows	26	43	24	38	36
EU FDI Inflows	360	380	483	209	239
Ireland as % of EU Total	7%	11%	5%	18%	15%

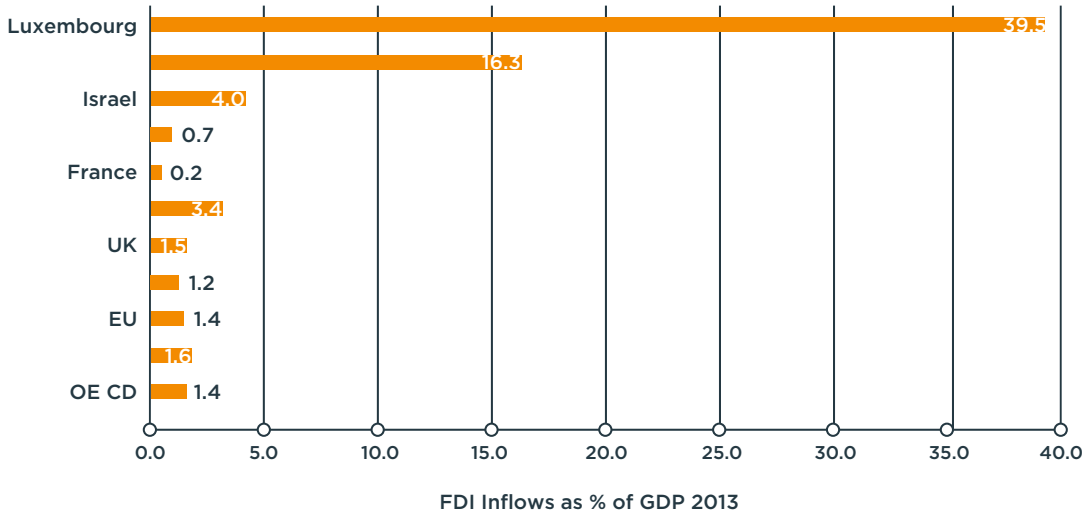
However, as Figure 5 shows, this increased share was more due to the decline in total EU FDI inflows than to a strengthening of Ireland's own inflows.

Figure 5: EU and Ireland FDI Inflows 2009 – 2013 (Billion US$)



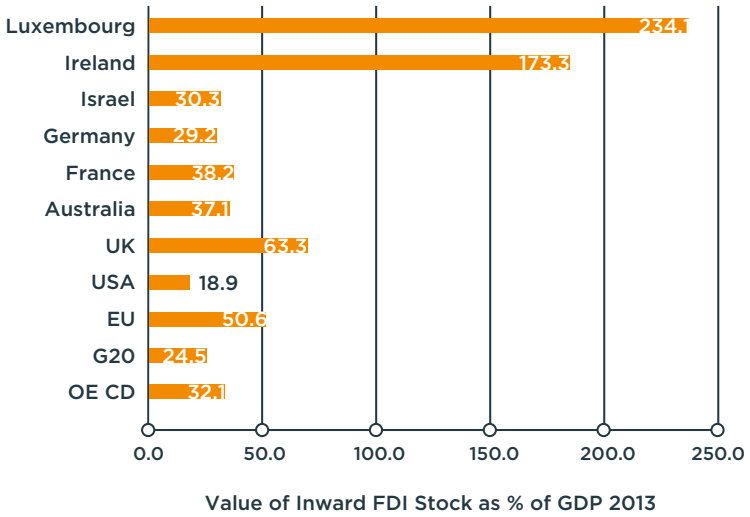
5.4 While this data provides a comparative picture of Ireland's share of total EU FDI inflows, it does not capture the importance of FDI to the Irish economy relative to other countries. One way to capture this effect is to measure the scale of the FDI inflows to a country as a percentage of its GDP in each year. OECD data on this measure is reported for 34 countries. Ireland's result is the 2nd highest of the 34 countries and is more than 10 times higher than the EU average. Figure 6 shows the value of FDI inflows in 2013 in selected countries and regions as a percentage of their GDP in 2013. If – as seems likely – the FDI inflows to Luxembourg are dominated by M&A and financial based transactions, then Ireland emerges as the country in the world which, relative to the size of its own economy, most benefits from direct investment from overseas.

Figure 6: FDI Inflows in 2013 as % of GDP 2013 in Selected Countries and Regions



If account is taken of the historic stock of inward FDI in each country, then Ireland, after Luxembourg, emerges as having the highest stock in the world. This is shown in Figure 7.

Figure 7: Historic Inward FDI Stock as % of 2013 GDP in Selected Countries and Regions



5.5 Ireland's experience of FDI inflows is, therefore, truly remarkable. It is also worth noting for completeness that (after Luxembourg) Ireland's FDI outflows – in the form of investments by Irish companies in other countries - is the world's highest at 230% of GDP in 2013, compared to an EU average of 60%, a UK result of 74% and an OECD average of 43%.

5.6 The IDA website lists many reasons to invest in Ireland, including being first in the world for inward investment by quality and value, availability of skilled labour, for investment incentives and being in the top 20 most innovative countries in the world. **Ireland is regularly rated as among the best in which to do business, for example, Forbes Magazine identifying it as the 4th best for business (after Denmark, New Zealand and Hong Kong)**. The current rankings given to Ireland by Forbes are broken down as follows:

Trade Freedom	9th
Monetary Freedom	11th
Property Rights	18th
Innovation	20th
Technology	12th
Red Tape	19th
Investor Protection	6th
Corruption	17th
Personal Freedom	1st
Tax Burden	6th
Market Performance	30th of 100 rated

5.7 This is a hugely creditable and important presentation of the case for investment in Ireland. It illustrates the type of approach that international investors or their advisers will examine when seeking a fresh location. **Most of these are characteristics are driven by international and national policy developments, so the extent to which Mayo can influence changes at local level will be restricted**. This however is not an excuse for failing to address local issues, but it is important for the Council to take a realistic view on the local capacity to influence investment decisions, particularly with regard to FDI.

5.8 In a further, more detailed perspective on investment, fDIintelligence highlights in its European Cities and Regions of the Future 2014/15 Report key competitiveness factors that influence investment decisions. These include:

- **Economic Potential**
- **Human Capital and Lifestyle**
- **Cost Effectiveness**
- **Infrastructure, and**
- **FDI Strategy**

5.9 This is a context in which Mayo can compete effectively. It would score strongly on Human Capital and Lifestyle and should be able – by concerted and focused effort, internally in the Council and with its development partners, the IDA and Enterprise Ireland - to improve its score on Business Friendliness and FDI Strategy. It is in this niche role that Mayo can play its investment cards most effectively.

5.10 Mayo has a number of locational advantages, including:

- **An outstanding natural environment**
- **A high quality of life, and**
- **A strong sense of association and affiliation to the County by its residents and the 3.5 million members of the Mayo diaspora**

5.11 Given the range, scale and diversity of investment opportunities that a county like Mayo could focus on, it must be realized that Mayo cannot command the scale of resources that other, larger regions could commit, for example, on FDI[3]. Mayo must be smarter than other regions in the deployment of its resources. Mayo County Council's EIU has commissioned a number of critical studies to assist in the direction of its work. These include sectoral strategies for food, tourism and the digital sector and a study of the priority sectors for development in the County. The Emerging Sectors Report recommended that Mayo should focus on a limited number of sectors and policies. These are considered in Section 7.4 of this Strategy.

5.12 The EIU has recently developed a range of Mayo brand materials which is impressive and can be used flexibly to support both a general and a very focused message about the opportunities in Mayo. Our new website platform is live and can be viewed at www.mayo.ie.

5.13 A further step would be to begin to energise and direct parts of the Mayo diaspora as agents for economic development for the County, rather than solely as a social (if effective) network. This might be piloted in certain geographical or sectoral areas (or both) to seek opportunities for investment, export sales, business co-operation or mentoring Mayo businesses. This is considered in Section 10 below.

5.14 Clarity of focus and relationships, commitment to indigenous and existing FDI businesses in Mayo, alignment of the education sector to the needs of business, strong branding and communications and an energised Mayo diaspora could be Mayo's recipe for successful economic growth and investment.

3 As one illustration of the scale of resources committed, UKTI – the UK Government's inward investment agency - is currently advertising a consultancy contract to support its work on FDI in England alone with a value of £3million per annum for 5 years. The consultancy resource is in addition to UKTI's own staff and the Consular staff in each British Embassy and Consulate around the world and in addition to the staff in Local Enterprise Partnerships across England and those investment promotion staff working in County and City Councils across England.

'Ireland is regularly rated as among the best in which to do business.'

06 PROFILE OF INTERNATIONAL AND INDIGENOUS ASSISTED INVESTMENT IN MAYO

6.1 Mayo has a wide range of international and national assisted investments, including IDA sponsored companies, EI supported companies, multi-national retailers and tourism interests.

6.2 Employment in the County over the past decade has been severely challenging, as might be expected given the prevailing economic conditions. However, both the IDA and EI supported companies have demonstrated considerable resilience, which has been underpinned by on-going significant investment over recent years. This has, for example, provided a platform for general sustainability in modern manufacturing in contrast to other parts of the Country. Levels of investment in the County are much higher than for other similarly scaled counties that would ordinarily be expected to be more competitive as a location for investment. Within the Western Development Commission[4] Area, Mayo has above average employment supported through the Development Agencies, at almost 17% in 2013. However, in national terms, this level is somewhat below the 19.1% average. Growth in such employment was in the order of almost 5% between 2012 and 2013, reflecting a number of significant investments in both international (increase of 6.1% from 2010 to 2013) and indigenous manufacturing in the County (increase of 2.7% between 2010 and 2013). In 2013, total assisted employment amounted to 8,310 of which 990 was part-time. It is also worth noting that Mayo had a net 1% increase in assisted employment between 2004 and 2013 in contrast with similar counties which experienced net reductions.

4 Trends in Agency Assisted Employment in the Western Region, Western Development Commission (WDC) Report, January 2015

6.3 Assisted employment is spread across most key sectors, but with an emphasis on modern manufacturing. The broad picture in 2013 is set out in Table 4 below:

Sector	% Assisted Employment 2013
Modern Manufacturing	40.8
Traditional Manufacturing	19.2
Information and Communications	7.5
Agri-food	27.7
Business, Finance and other service	4.8

Source: Western Development Commission

6.4 The relatively dispersed nature of investment in the County reflects the legacy of a dispersed investment model, dating back two decades, at national level. As a result, investments into the County in more recent years are more likely to have been influenced by long-standing decisions to invest in the first case in the County, rather than necessarily reflecting changing national development policy. Sustaining a facilitating and supporting environment for this legacy investment is a hallmark of existing IDA and EI effort in the County.

It has resulted in on-going investment which would not ordinarily be expected in the context of current international investment policies. The positive environment for sustaining investment has been underpinned by the supporting role of Mayo County Council. This approach across the three organisations needs to be sustained. In that context, it should be noted that the West Regional Strategy of the IDA is to deliver between 92 and 99 projects from 2015 to 2019.

6.5 The retention and development of existing overseas investment across the principal towns of the County remains a clear priority. Limited international investment in smaller towns/villages (with the exception of the tourism and primary resources sectors) is clearly evident and unlikely to change in the immediate future, unless a focused effort in a limited number of investment sectors can be identified and delivered. Given prevailing international investment thinking, such investment is likely to be indigenous rather than international.

6.6 Therefore, the principal focus of the Council should be for indigenous led developments supported by the Local Enterprise Office, the Council generally, Udaras na Gaeltachta and Enterprise Ireland. It is worth noting that the proportion of assisted companies[5] which are indigenous is higher in Mayo, at over 54% in 2013, than the national average of just under 50%, indicating the significance of such investment at national level, but most specifically in Mayo itself.

6.7 Existing investment is based on the capacity in the County to supply needs ranging from large volumes of water to skilled employees , and, in the main urban centres, a relatively good infrastructure which allows accessibility to markets. The stand out USP is, arguably, the quality of life in the County, particularly the condition of the environment generally, education, low levels of crime and relatively competitive priced housing.

6.8 There is limited supply chain potential in the County notwithstanding the level of investment. Facilitating access to global supply chain opportunities is best retained though nationally coordinated actions given that access to such opportunities will require firms with the necessary working capital and scale to meet client expectations.

5 Trends in Agency Assisted Employment in the Western Region, Western Development Commission (WDC) Report, January 2015, Figure 32

6.9 The regional offices of the IDA and Enterprise Ireland have restricted support services including administrative and intelligence/information access. There is some potential for the Council to offer supporting administrative services to both, with the forthcoming appointment of economic graduates worth exploring as a template for the country as a whole.

6.10 Given the current national focus on greenfield investment being concentrated into the Gateways, as well as current international investment trends, expectation of major investment from Greenfield investments should be restrained. Nonetheless, the Council should work to create the conditions which would sustain the choice of Mayo as a location of choice for likely visits and relevant investments. A key aspect to this is the fact that Mayo does have clear competitive advantage in regard to the quality of life in the County alongside improving access to the principal towns, quality water and waste water infrastructure. These will be examined further in this Strategy.

6.11 Given the Emerging Sectors Report and the identification of quality of life as a critical selling point, the Council should work alongside the national development agencies to ensure that international based small investment/micro-enterprise potential can be facilitated through provision of shared facilities and other resources that would complement the work of the Agencies. This will also be further explored later in this strategy.

07 THE LABOUR FORCE SKILLS AND AVAILABILITY LOCALLY/REGIONALLY

7.1 There are no major skills shortages in the County given the general employment catchment in Galway-Mayo corridor. Expansion of the M17 as well as development of the N5 will further enhance commuter capacity into the County. Employment in the County in 2011 was spread across the sectors set out in Table 3 below:

Sector	Employment Nos.
Wholesale and Retail	7,675
Industry	6,460
Health and Social Work	5,695
Education	5,411
Banking, financial and real estate	4,190
Hotels and restaurants	3,949
Public Administration and Defence	3,481
Construction	3,203
Undeclared Industry	2,200
Other Services	1,988
Transport, storage and communications	1,697
Total	**45,949**

7.2 The County has, however, a higher than average level of no formal education/primary only education relative to the rest of the State, while tertiary education levels as a proportion of the population remain below the national average, despite a continuing higher than average progression into tertiary education. This indicates that, as of 2011, the County did experience a brain drain, with those leaving the County for tertiary education not returning, alongside a considerable disruption to part-time non-exporting sectors such as construction. There is a limited correction of this taking place at the moment, thanks largely to the increase in assisted employment opportunity in the County since 2010, but nonetheless, there is some distance to go to create a platform for the multi-disciplinary skills that will be required to 2020.

7.3 The Western Development Commission has highlighted the key skills areas for the West. This has been informed by the National Skills Survey 2014 and is based on sectoral conditions that suggest the national employment outlook to 2020 will be as follows:

Sector	Outlook
Agriculture	Current growth, but longer term decline
Manufacturing	Employment to increase by 40,000 especially modern manufacturing and firms exporting outside EU/US
Construction	Recovery, but not to 2007 levels
Wholesale and Retail	Dependant on general economic growth and increased spending
Transport	Likely to grow above average
Knowledge Services	ICT, financial and professional services likely to have strongest growth
Accommodation and Food Services	Growth through general economic conditions and increase in tourism
Public Sector and Education	Growth based on demographic influences

7.4 The Commission has, as a result, highlighted the following as having growth potential particular to the West:

Food – higher value-added, organic, artisan, functional, marine, R&D. Mayo has strong national position in agri-food

Green Economy – wood energy, wind & ocean energy, retro-fitting, energy efficiency, home improvement

Care – elder care, residential & home care. In some areas of Mayo more than 1 in 5 people are aged 65+ with 30% living alone

The Emerging Sectors Report Priority Areas recommended in this report include the following sectors in addition to the above:

- **Tourism**
- **ICT and Creative Industries**

7.5 Meeting the skills needs of these areas will be underpinned by the existing solid flow of graduates in levels 6-9 from GMIT/NUIG/IT Sligo. However, as noted elsewhere in this report, there is a need to focus on education and skills capacity development from within the existing workforce which is, as noted above, below national averages. While likely future demand will be determined by having a population with the skills needed in emerging sectors as well as skills re-configuration within existing sectors, the exclusion of the existing under-skilled population would be a lost opportunity.

The Council, through its role on the Local Community Development Committee, should be seeking to address this particular challenge. The opportunity to do so presents itself with the developing role of the Local Community Development Committee and the roll out of the Social Inclusion Community Activation Programme (SICAP).

7.6 A significant but unknown reservoir of educated/skilled people is likely to be a large feature within the Mayo Diaspora. There is a case for building a profile of these people and their interest in returning to Mayo to develop new opportunities or take up potential opportunities from on-going investment in the County.

'There are no major skills shortages in the County given the general employment catchment in Galway-Mayo corridor.'

08 CURRENT PHYSICAL INFRASTRUCTURE AND TECHNOLOGY DEVELOPMENT

8.1 The County has long suffered from a level of under investment in its infrastructure. Progress is being made in developing surface transport into Dublin and Galway with the commencing of the M17, the completion of the N5 Ballaghadereen By-Pass as well as by-passes of Claremorris, Charlestown and Swinford. Current levels of investment have been restricted in light of national finances, but it is expected that some further progress will be made in the next 5 years with the development of a northern relief road in Westport and the development of a new N5 dualway from Westport to Turlough. While it might be worth acknowledging that road based investment has not apparently made a significant contribution to investment decisions in the County per se (this is due in part to general infrastructure improvements including renewal of rail freight, enhanced water and waste water services, and energy), **the N5/N26 remain inadequate, while access from Castlebar and Ballina to Galway is also unacceptably poor.**

8.2 Ireland West Airport Knock is a critical piece of infrastructure in the County with regular connections to cities in the UK. These cities have large populations of Mayo diaspora and, as such, ease of access already brings benefits through social engagement and tourism. The potential for business based service development is a key aspect of the Airport Development Plan and, understandably, is a focus for the Council as it builds its relationships with the diaspora in regard to business developments in the County. The Airport has recently secured investment from surrounding local authorities so there should be a regional dimension to such actions, where possible. The feasibility of developing an air freight hub should ideally be examined as a key pillar for the long-term sustainability of the Airport.

8.3 The County has relatively good rail connectivity into the national rail network, albeit focused on Dublin. This has provided the basis, due to the level of foreign investment in the County, for underpinning a rejuvenation of freight traffic generally on the national network. Current connectivity is based upon access into Dublin Port and via, Portarlington/Kildare into Cork/Limerick and Waterford. The recent commitment of An Taoiseach to advance consideration of the renewal of the Athenry/Claremorris line underpins what should be a strategic freight corridor bringing the

North West and West into more direct connection with the principal ports of Shannon Foynes (now included in the ETrans Rail Network and proposed for inclusion in the Junker Plan) and Cork and Waterford Ports.

Such a move would strategically open up the possibility of a re-configuration of freight movements across the island, enhance the business cases for Galway and Foynes Ports and potentially provide competitive benefits to logistic operators having greater choice of port access. Therefore the Council, through the spatial planning of the County, should ensure that planning policy seeks to retain the existing rail alignment free from unnecessary and conflicting developments/encroachments.

8.4 Solid waste management is provided for through the West Regional Waste Management Plan and meets expected needs. More generally, the high quality of the environment continues to need protection. This is a critical feature of quality of life. There is evidence of illegal dumping in the County. **Such activity is noticed by international investors and can be a significant negative influence as it suggests a lack of due care and attention. This is a key function of the Council and it needs to demonstrate the capacity to mitigate such unacceptable practices through direct action and awareness raising.**

8.5 Energy supply will be an issue if Gridwest is not delivered in current planned timeframe. More generally, sustained energy access remains a challenge outside of the principal towns with a resulting reduction in attractiveness from an investment perspective.

8.6 Broadband/4G is barely adequate in the main towns and otherwise poor throughout the County. Capacity for development is however looking positive, with the roll out of the Corrib Cable Investment as well as the national policy commitment to install high performance broadband and bandwidth over the next 5 years. The Claremorris IT Model provides the County with a short-term competitiveness advantage over similar scaled communities throughout the island of Ireland.

8.7 Development of this critical aspect of infrastructure has to be a priority if rural communities are to have any prospect of sustainable business development in the immediate future. The lack of consistent ICT access throughout the County is a restraining influence on investment of all types and can be a deterrent to both indigenous and external investment, including among those whose investment decisions are heavily weighted towards quality of life and work-life balance.

8.8 Arguably the correction of these broadband deficits are the most critical infrastructure challenges confronting the County, and the Council should focus on ensuring that the incoming National Broadband Plan is delivered as quickly as possible.

8.9 The education sector has benefitted considerably from investment in the past three years in primary and secondary levels. Third level is also seeing solid investment in the County and in Galway and Sligo. The development of the Innovation Centre in GMIT, Castlebar is also an added advantage. Nonetheless, such investment should be seen as a must have and cannot be considered as a competitive advantage as every location on the island has or is seeking a similar platform. In any event the County, no matter the progress in delivering added tertiary education, will continue to compete against the principal tertiary education centres such as Galway.

8.10 The Council should seek to explore the potential for expanding linkages into the tertiary sector in Galway and Sligo and other potential tertiary education providers in a limited number of targeted areas where research requires the type of high quality, low population environment that exists in Mayo. These include digital developments, something already being addressed by the Council with the implementation of its forthcoming Digital strategy.

8.11 Housing availability is not a significant issue relative to much of the rest of the Ireland so there is a limited competitive advantage in this regard.

8.12 On-going and not inconsiderable investment in social and leisure facilities does place the County to the forefront of such service needs nationally, but this is of limited impact in international investment decisions.

09 ASSESSMENT/SWOT ANALYSIS

9.1 The SWOT Analysis is based upon the acknowledgement that taxation policy and levels of incentives for enterprise development are, by and large, shared across the western counties and cities of Ireland. Therefore, the objective must be to focus on issues with added value or disadvantage particular to Mayo.

Strengths

- Access to diaspora
- Existing international investment
- Extant of innovation in the County
- Quality of life
- Location on the Wild Atlantic Way
- Improved transport access

Weaknesses

- Poor to very poor broadband and 4G
- Internal negative view of own County
- Disaggregated investment management
- Limitation on sustained trade role for Council staff
- Pipeline of skills for emerging sectors
- Lack of Gateway status

Opportunities

- Council re-configuration including establishment of EIU
- Political backing
- Rebranding of Mayo
- EA Fibre Cable project
- Corrib Pipeline/Cabling
- Gridwest
- Energy hub development
- Expanding indigenous export potential

Threats

- Failure to move business into diasporic networks
- Policy dilution/delusion
- Poor Council/Institutional service performance
- Failure to deliver infrastructure
- Other counties "catching up"

9.2 In broad terms, the County is well placed to deliver a firm investment platform for both external and internal investment decision-makers. The many strength of the County is a clear demonstration of a proven proposition as an investment location. This will be further enhanced by a comprehensive re-configuration of the Council and its service offerings, along with the delivery of further key infrastructure. However, there is a challenge to the Council in sustaining a focus on weaknesses within the County Investment Offering.

Poor telecommunication capacity is a major constraint as already noted earlier. The Council must take a lead in ensuring that the national broadband plan is delivered in Mayo at the earliest possible time.

9.3 Re-skilling of Council staff to orientate them towards an understanding of business and the Council role in leading local economic development is also necessary. The creation of such an ethos would facilitate business investment to a large degree. In addition, the Council must ensure that it delivers its corporate commitments and statutory mandate as fully as possible. There is a real danger that, as other Councils across the State and in Northern Ireland become more pro-active, the competitive advantage the Council holds will be eroded. Continued underpinning of the EIU in the Council should therefore be recognised as a critical feature of business planning in the Council.

10 POTENTIAL MARKETS AND NICHE MARKETS, AND THE RESPECTIVE PROMOTION STRATEGY PER MARKET

10.1 Given the relative ease of access (thanks to Ireland West Airport Knock) between Mayo and key UK cities, including London and Manchester, and the development of the Mayo brand, the Council should in the first instance look to developing the potential of the Mayo diaspora in these cities. There is a need to focus on opening, through the diaspora in these cities, opportunities for SMEs to export while also exploring the potential for investment into Mayo. The investment focus should underpin the recommendations of the Emerging Sectors Report.

10.2 Niche market potential within the US could also be developed as per the MOUs with Rhode Island and Cleveland. The priority in both should however, in the first instance, be concentrated on marketing the County for tourism, and as this establishes a flow of tourists, the potential for applying a model similar to that in the UK for business investment could then be considered.

10.3 Therefore, the Council should focus on promotion activities centered on the activities of the Mayo Associations. In the case of the UK Associations, the opportunity to explore business development opportunities as well as tourism promotion should be at the heart of a diaspora engagement programme. Such a programme should include presentation of investment opportunities, joint venture proposals, networking of SMEs, shared training and development potential, coordination of Mayo inputs into appropriate events under the umbrella of the local Mayo Associations in London and Manchester and ultimately Rhode Island and Cleveland.

10.4 There are many international events organised with an international investment audience in mind. It is questionable whether these are a useful vehicle for promoting Mayo as a location for investment. The focus, given limited resources, should be on the UK/US Associations as platforms for promotion, if this is acceptable to those Associations.

11 PROMOTING MAYO INVESTMENT OPPORTUNITY

11.1 The central role of the IDA in regard to international manufacturing and traded service development in the County has, and remains, critical to investment potential in Mayo. The primary role of the Council in regard to FDI is to provide the environment where investment proposals through the IDA are facilitated and sustained. In this, the Council has a positive track record. Nonetheless, a greater integration of investment perspective into the corporate planning and service delivery of the Council should be given effect, as intended in the Corporate Plan 2015-2019.

11.2 The potential to use the Diasporic Networks of the Council to open up new access points for investment development to create pipelines for the IDA, EI and the Council itself should be a focus for the Council in the immediate future in line with section 10 above. Such a role is acknowledged in the 2015 Action Plan for Jobs. A diasporic development plan which seeks to identify business investment potential among the Mayo diaspora should be completed, with input from the more active international Associations and other leading personalities with Mayo connections. There is limited understanding of who makes up the diaspora and what, if any, contribution they could make, given their standing and investment potential. There is, at least, the potential, through the Associations to open markets for existing Mayo Producers.

There is also the potential for a possible pipeline to feed to the IDA and EI with a view to direct investment in the County. Such potential needs to be clearly understood, targeted and realistic in its expectations in developing a potential pipeline. The Council should engage with Connect Ireland and Start Up Ireland as envisaged in the 2015 Jobs Plan.

11.3 A sustained positive messaging about Mayo as a place to live, work, and invest in should be a hallmark of Council activities at home and abroad. Considerable progress is being made in regard to the re-branding of Mayo.

12 MAYO AS A TARGET FOR INDIGENOUS AND FOREIGN DIRECT INVESTMENT

12.1 Currently, the County is well placed as a location for investment thanks to the already high level of inward investment in manufacturing, services and tourism. That acknowledged, the investment in recent times is based upon legacy investment in several cases. The number of site visits on new potential is limited. As noted previously, this is likely to remain the case due to the priority given to investment location within the Gateways and to the demands of international investment for advanced connectivity, perceptions of staff skills, accessibility and limited additional financial incentive over the Gateways, most notably Galway and Limerick.

12.2 Considerable potential, nonetheless, does exist from highlighting the current international investors in the County; Coca Cola, Hollister, Allergen, Baxter and the Tollman Group among others. The indigenous sector is also well developed with a proven track record of EI sponsored companies such as McHale Agri-Engineering entering into international markets.

12.3 A focus for the Council is the creation of environmental and associated conditions that will be conducive to supporting foreign investment in the County. This includes the provision of on-going support to both the IDA and EI, including the provision of information, intelligence and general support in the organisation of site visits, etc. In addition, the Council has adopted spatial policies which will complement the needs of both agencies. The provision of infrastructure - social and economic - along with the development of land banks/facilities to fit with the regional priorities of both agencies is acknowledged in the planning policies of the Council but should be reviewed in light of the forthcoming renewed regional policies of both agencies.

More broadly, the Council needs to ensure that Mayo and its investment advantages/potential are recognised. The development of the EIU and its support services will go some distance to achieve this need.

12.4 In addition, pro-active sponsorship of investment workshops through the Mayo Associations and other international links should be a feature of Council actions. The objective should be to convey a message that Mayo has a demonstrated business offering that is additional to that offered through the National Development Agencies. This could include the provision of family-centered information and local introduction to services required by the investor, such as access to housing and auctioneers, education and school principals, community engagement and personal introductions, factors which would help ease entry by an investor and his/her family if appropriate into the Mayo social and community life cycle.

13 PROMOTING INVESTMENT OPPORTUNITY IN MAYO

13.1 Mayo can define its own niche message. Having done so, however, there is the question of how best to promote that message. Sectors with particular potential were identified in the Emerging Sectors Report. The EIU has recently developed a range of Mayo brand materials which will soon be applied to a new Mayo website. However, there is a need to target the message selectively. Among the priorities are:

- **The Mayo diaspora, particularly those in managerial and decision-making roles in international businesses**

- **The Mayo diaspora in international accounting and consulting firms (including those in Dublin) who may often be asked to advise their international colleagues on locations in Ireland for investment projects and may not, without being targeted, consider including Mayo** in long or short lists for projects, even in a niche role

- **Specialist international FDI advisory firms** such as EY, KPMG, the IBM specialist subsidiary Plant Location International (http://www-935.ibm.com/services/us/gbs/strategy/pli.html) and the Financial Times specialist subsidiary fDiIntelligence (http://www.fdiintelligence.com/)

13.2 There is also a range of specialist investment conferences, trade fairs and exhibitions. The largest and most prestigious of these are MIPIM, held each March in Cannes and MIPIM UK, which is held each October in London. However, the Mayo voice is likely to be lost in such major venues and it may be better for Mayo to focus on specific events held in Ireland, in addition to building a profile through the international associations (as it did with the drones conference).

For example, Northern Ireland has had a series of major Investment Conferences held in Brussels, Washington, London and Belfast sponsored by the UK Government and with active support from the US Government and the European Commission. Firms attending such a conference are already open to investment in the island of Ireland, are ready to invest but may be seeking relief of Corporation Tax as an additional incentive, which Northern Ireland can only offer from 2017 at

the earliest, but which Mayo can offer now. One approach would be to identify those firms that participate in the Northern Ireland Investment Conference to be held in Spring 2015 and offer them the Mayo alternative.

‘Firms attending such a conference are already open to investment in the island of Ireland, are ready to invest but may be seeking relief of Corporation Tax as an additional incentive.’

14 ECONOMIC PRODUCTIVITY OF THE AREA

14.1 Gross industrial output in Mayo/Roscommon is considerably above average at 0.88 million per person engaged. Only Cork has a higher per capita output. GVA figures suggest this is the case but these are skewed by the presence of Coca Cola, Allergen, Hollister etc., in particular.

14.2 The level of disposable income in the County is somewhat below the national average. At €17,818 in 2010, it was some €1,500 below the national average.[6] While such figures must necessarily be treated with caution, the gap is sufficiently wide to indicate lower spending capacity in the County relative to the national average. It is also indicative of there being some competitive advantage in employee costs relative to other, primarily urban, centres in the State.

6 Indices of disposable income per person by county, 2005 & 2010, CSO, cso.ie/en/media/csoie/releasespublications/documents/otherreleases/2013/regqualityfull.pdf

15 THE POTENTIAL FOR DEVELOPMENT OF MICRO-ENTERPRISE

15.1 Entrepreneurship has traditionally been limited in the County and negatively impacted by history of migration out of the County. In recent years however, it is important to note considerable progress in underpinning entrepreneurship throughout the County, principally due to the supporting efforts of the County Enterprise Board and local development companies. This is now evident in the relatively vibrant tourism and food sectors in the County. It is also evident from the growth in supported enterprises under Enterprise Ireland. Several of these are now established exporters, headquartered in Mayo, which indicates that the peripheral nature of the County is less a factor in accessing international markets than might have been perceived previously.

15.2 The recent progress in developing a vibrant indigenous micro-enterprise economy will continue with the development of the Local Enterprise Office, the integration of the Office within the Council and into Enterprise Ireland. The opportunity to build upon an already solid platform for migration of micro-enterprise into SME status is now well established. The progress in developing the Mayo brand and the creation of a shared marketing platform for such products further enhances the capacity for on-going development. The recent report on emerging sectors highlights several sectoral possibilities. The most likely of these need to be prioritised to minimize the potential for dilution of effort. **In that regard, emerging sector development from a micro-enterprise perspective should focus on those which underpin the quality of life in the County** given that this is a critical feature in FDI investment decisions which would mark out the County as a location of choice. These areas include:

- **Creative Industry and ICT**
- **Tourism (See 16 below)**
- **Food and Agri-support Services**

15.3 The Creative/ICT sector centered on micro-enterprise is a developing sector in the County. More critically from an international perspective, and with the development of initiatives such as the National Broadband Plan and the connection into the EU/US dark fibre link, the area does have the potential for both long-term and short-term entrepreneurial activity based upon its quality of life. The recent success in hosting the Drones and Surf Conference could provide the County with a path into leaders in micro ICT/Creative Industry if followed up by related actions. **These include the development of a small number of centres throughout the County where potential ICT developers could place themselves for short, medium and longer term periods where their ideas could be facilitated.**

15.4 The food industry in the County has a number of nationally recognised producers such as O'Haras Bakery and Kelly's of Newport among many others who provide employment in smaller towns, villages and rural communities throughout the County. These are providing the County with a platform to build up other food producers, already recognized by the EIU. The networking with the Musgrave Group is an example of the Council creating the framework through which high quality local food producers can now begin to access a national market. The current efforts of the Unit should provide the basis, with the support of Enterprise Ireland, to migrate artisan producers into larger but appropriate scale production and employment. There are therefore two challenges.

The first is to create the conditions for shared artisan food producers to sell on a unified basis under the Mayo brand and, secondly, to put in place the pathway for likely growth producers to become supported by Enterprise Ireland.

15.5 There is some potential for grandfathering into export markets, through the diaspora into the UK markets in particular. The current food platform in the County is now at a point where a pilot initiative to open into one of the principal cities or a principal retailer in the UK should be examined. A simple feature of bringing Mayo food to the international table is to use the opportunity through the various social gatherings of the diaspora as a platform for demonstrating the quality of that

food. Put simply, if a Mayo focused dinner is taking in place in London, for example, Mayo food should be on the table and highlighted as such. **This should become a critical action for the EIU in 2015.**

16 AREA'S POTENTIAL AS A LOCATION FOR TOURISM ACTIVITIES

16.1 The Emerging Sectors Report highlights the potential of the tourism sector in Mayo. The County has the basis for becoming a "must visit" location at the heart of the Wild Atlantic Way. Increased footfall will drive enterprise development through tourism. There is already considerable evidence from initiatives such as the Great Western Greenway that this is the case. Tourism does therefore provide the County with the opportunity for early wins, as well as providing the opportunity for international investment interest. Priority on the part of the Council and other key actors in the County such as the local development sector should place such development at the heart of their business planning.

The implementation of the Tourism recommendations in the Emerging Sectors Report should be undertaken over the coming two years with a specific focus on pushing visitors out across the County as suggested in the Report.

16.2 There is a vibrant evening economy in the principal towns of the County. There is a challenge to create a similar vibrancy in smaller towns and villages. Consideration might be given to identifying a small number of such communities close to key attractors, and encouraging them to undertake evening economy events such as cultural events, for example, that would begin to create an attractor foundation for the relevant communities.

16.3 As growth in tourism continues, the need for improved accommodation offering should be examined in the context of the planning policies of the Council. It may become evident that parts of the County will have under provision, and rather than waiting to see this become the case, the Council could usefully examine likely need in what will be a growing demand area. It would also provide the opportunity to move the accommodation offering out into a wider County context rather than the current position.

17 EFFECTIVE SUPPORT STRUCTURES TO HARNESS INDIVIDUAL ENTERPRISE AND SOCIAL ECONOMY ACTIVITIES/POTENTIAL

17.1 The Council has put in place an Economic Investment Unit which basically provides a one-stop shop for entrepreneurs and investors in the County. The team is multi-disciplined, providing support services including the Local Enterprise Office team, planning, engineering and financial management resources from within the Council itself. The Unit is fully supported by senior management. The new Corporate Plan clearly places the Unit at the heart of the Council's business planning.

17.2 The Council, as the leading public service body in the County, is charged with ensuring sustainable development of the County. In this regard, it has prepared a draft Local Economic and Community Plan which sets the strategic economic direction for the County. The positioning of Mayo as a place of investment choice is a central pillar of the Plan. This places an obligation on the Council to re-configure its services to ensure that a fully integrated service platform underpins the development role of the EIU.

17.3 The broad objective of the EIU is to build upon current activity to have the County become the Start Up County for Start Up Businesses, local and international in Ireland. The Unit should therefore position the Council to offer a fully integrated service to support investor and entrepreneur transition to Mayo. This is of particular concern for incoming investors needing access to human factor services such as housing, community entry and networking, access to education and other local person-centered services.

17.4 Business planning within the Council needs to be fully attuned to the objectives of the LECP and the work programmes of the EIU, the IDA and EI so as to provide a streamlined service to each strand of the investment sector relevant to the County. This will mean, at times, a re-prioritization of spending in areas such as local road projects, as well as requiring the provision of an entrée into other public bodies such as Irish Water.

18 MEASURES TO IMPROVE KEY SOCIAL, AMENITY AND EMPLOYMENT OPPORTUNITIES

18.1 Data, such as it is, indicates that, outside of the international manufacturing/internationally traded services, productivity is relatively low. The impact of output from the FDI Sector in Mayo is such that low productivity levels are largely masked. The dependency of the economy on relatively low income sectors such as retail, construction and farming is clearly evident. Realistically, given the skills profiles within these sectors, the most appropriate pathway out of a relatively low productivity based economy is through enhanced training and development of people within these sectors. **Development of bespoke programmes targeted at progressing people from low economy functions into higher order functions would contribute to an enhanced reservoir of skills underpinning movement of the County into a higher value services orientated economy.** The Council should address this issue in cooperation with Solas.[7]

7 As one illustration of the scale of resources committed, UKTI – the UK Government's inward investment agency - is currently advertising a consultancy contract to support its work on FDI in England alone with a value of £3million per annum for 5 years. The consultancy resource is in addition to UKTI's own staff and the Consular staff in each British Embassy and Consulate around the world and in addition to the staff in Local Enterprise Partnerships across England and those investment promotion staff working in County and City Councils across England.

19 DEVELOPMENT POTENTIAL THROUGH TRANSNATIONAL LINKAGES

19.1 As outlined throughout this Report, the need to understand the make-up of the membership of the Mayo Associations in US, UK and Dublin should become a focus of effort for the Unit over the next number of years. It is possible, given the age profile and economic positions of people within the diaspora, that, if an appropriate "business ask" was framed, potential opportunities for "grandfathering" local enterprise, along with actual investment, might become feasible through the Associations. So it is recommended that the Unit examine the membership of the diaspora on the following lines:

1) **Are there people with resources/decision-making capacity to influence investment decisions which would complement the emerging sectors priorities or investment in the County**
2) **Prepare a business investment package for targeted diasporic members**
3) **Keep regard to the need to be complementary to IDA/EI Networks and also Connect Ireland/Start Up Ireland**

19.2 The local authorities in Northern Ireland have played a more developed role in economic activities for several years. These authorities are open to exploring cross-border ventures which could underpin the respective roles of Mayo County Council and a relevant Northern Irish local authority. It also should be acknowledged that the experience in Mayo of developing tourism projects such as the Western Greenway and Mayo's experience in "future planning" are key areas of interest to the Northern Irish Authorities. Given that a number of the principal towns in Mayo have existing links to towns in Northern Ireland, and given the re-configuration of the local government system in both jurisdictions, it would be appropriate to examine the possibility of developing economic-based contacts that would allow for sharing of experience and possible joint marketing initiatives, among other actions.

20 COUNTRY FOCUS FOR THE MAYO BRAND

20.1 Mayo has access to key networks in Rhode Island and Cleveland in the US and the major cities in the UK. These networks and those within Ireland should be the primary focus for building brand recognition by the Council in addition to the efforts of Fáilte Ireland, the IDA and EI. The objective should be to deliver investments of appropriate scale to areas outside of the principal towns as well as underpinning the current acknowledgement of the Three Principal Towns as a focus for Foreign Direct Investment.

20.2 Looking to other Mayo-centric Communities to open doors into local investment sectors and mature investment leaders is a valid objective once a pipeline of investment projects begins to develop from the recommendations in 20.1. The development of a consistent flow over time of investment projects based upon the recommendations of this Strategy could provide the basis for complementarity between the work of the development agencies and the EIU in the Council. This can be most effective with the sharing of business planning through regular meetings and, where appropriate, agreement through memoranda of agreement/shared service level agreements.

21 MAKING MAYO A TARGET FOR INVESTMENT

21.1 What does all this mean for the targeting of efforts to promote Mayo as an FDI location? There are a number of important points.

21.2 Mayo is a small and relatively remote county and while it may be 'sustainable, inclusive, prosperous and proud,' it is not going to be a major location for FDI. However, with a population of just 130,000 Mayo can be a niche player in FDI markets and a relatively small number of successes will make a major contribution to the local economy.

21.3 There are locational factors which Mayo cannot change and some which it can change. It is unlikely to change its population size and relative remoteness, and it will not wish to downplay its dramatic land- and seascapes. However, there are factors which can be changed such as the business friendliness of the County, the orientation towards enterprise of its educational system, incentives for those who leave Mayo for 3rd level education to return and the support and mentoring that can be offered by Mayo's diaspora networks if they can be energised around both indigenous and overseas owned businesses.

21.4 Mayo has a strong set of locally owned and managed businesses and the EIU has begun to structure relationships with those businesses in a way which already is leading to (an admittedly small number of) trade and investment opportunities. This is an important investment in future potential – but it is a long term investment. When Northern Ireland did not have access to FDI because of its image and the reality of the Troubles, it supported local SMEs to grow. Now companies such as Norbrook, Randox, Wrightbus and Almac are major employers and exporters in their own right with extensive international operations,[8] while others such as Fisher Engineering, Finlays, Moypark, F G Wilson and Huddleston Engineering have been acquired by international investors and remain as important investors, exporters and employers in the Northern Ireland economy.

21.5 This is a long term investment, the full benefits of which will not be achieved until after 15 to 20 years – however, those longer term benefits will only be delayed if work to grow indigenous businesses does not start now.

21.6 Mayo has, for its size and location far from metropolitan areas, a remarkably strong existing endowment of overseas owned firms. To the extent that their overseas owners continue to invest in those firms, Mayo is receiving FDI. An important action will be to ensure that those firms feel strong and valued members of the Mayo community and that their needs are met. Firms such as Allergen, Baxter, Chesapeake and Abbott will have their own investment cycles, and if investment in Mayo cannot meet the internally set requirements for a return on investment in renewing and developing plant, then the investment will be made outside Mayo and the longer term competitiveness of the Mayo plant may be compromised. In addition to the reinvestment and development cycles, opportunities may arise from time to time for the Mayo establishments of international companies to bid internally for a new project or product development. For these reasons, it is essential that the EIU team work closely with the IDA and local FDI senior management in existing overseas-owned businesses in Mayo to ensure that the case for re-investment and new investment in Mayo is advanced within those companies with confidence.

21.7 Workforce skills are an important sub-ordinate factor in locational choices. Over time, existing plants develop workers into a way of working and a level of know-how that meets their needs and improves their competitiveness. **It is important that the 3rd level educational providers in and around Mayo are attuned to the needs of companies, not only at operative, but also at technical and managerial levels.**

22 MARKETING MAYO FOR INVESTMENT

22.1 The marketing of Mayo has to be based on the existing quality of life in the County and ensuring that the County addresses a number of significant infrastructure deficits, most notably access to broadband and 4G. Until these are fully addressed, the County will continue to face the prospect of having to compete against other better endowed cities and counties on the island. No marketing strategy can overcome these gaps which are central to success in the emerging sectors.

22.2 A unified positive message across the development agencies is nonetheless critical and this requires continued liaison between the Council as a whole and the development agencies. The Unit needs to be constantly scoping the investment environment with the Agencies to ensure that no unnecessary blockages to investment are sustained. It is evident that measures to ensure this is the case are already in place.

22.3 As highlighted earlier in this Strategy, the focus for marketing the County for investment purposes on the part of the Council should continue to be on the diaspora. A diasporic development plan should address this, along with the possibility of developing a leadership within the diaspora that would be facilitated to promote the investment value of Mayo. Such an approach would allow the Council to focus on a limited but realistic number of activities and to do so within the limited resources available to the Council.

22.5 This is a long term investment, the full benefits of which will not be achieved until after 15 to 20 years – however, those longer term benefits will only be delayed if work to grow indigenous businesses does not start now.

23 REVIEW OF STRATEGY

This strategy, if implemented in full, has the potential for delivering considerable opportunity throughout the County. This requires a focus on delivery, particularly by the Council. A review of delivery will therefore be undertaken 18 months following adoption. The Manager's Reports to the Council will also highlight progress or otherwise, as required. The Council is committed to full delivery of the actions set out in this Strategy, and where required will put in place any necessary mitigation actions where delivery to the targets set out are not being achieved.

24 CONCLUDING REMARKS

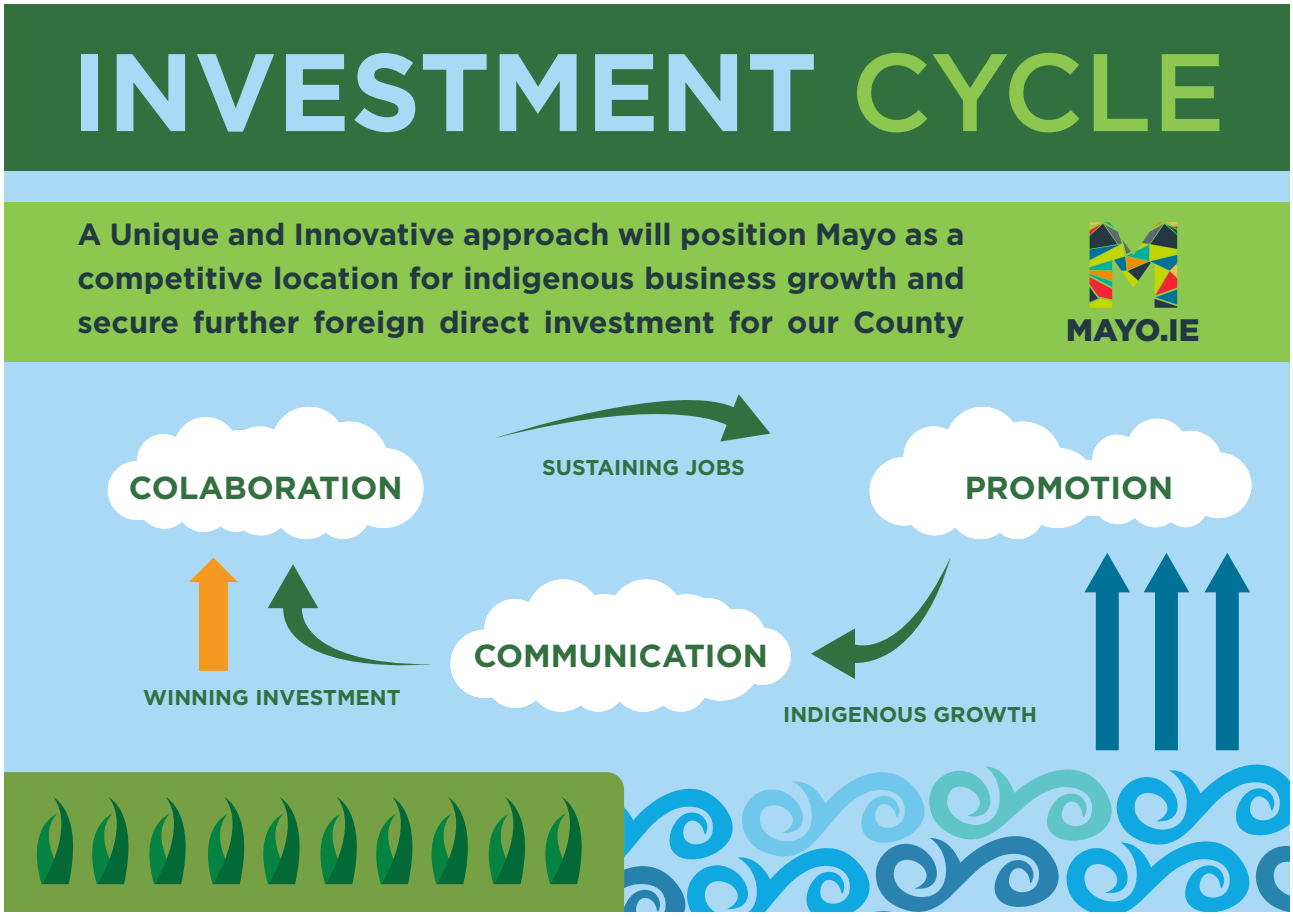
24.1 The Council, through the EIU, has to focus on strengths of and opportunities for the County within a narrow range of themes/economic sectors as recommended in the Emerging Sectors Report and this Report. The IDA and EI and, where relevant, Údarás na Gaeltachta, will continue to deliver on their mandate, but with the suggested administrative/knowledge support of Mayo County Council. So what can the EIU reasonably be expected to do?

It is recommended that the following Road Map (2015-2020) be adopted and implemented immediately. Under the heading of 'Investment Cycle' the following unique approach will sustain jobs, support growth and win investment.

Mayo: Invest, Retention and Growth Strategy

4 Strategy Pillars

1. Business Attraction
2. Business Retention & Expansion
3. Investment Ready
4. PR, Communications & Marketing


INVESTMENT CYCLE
A Unique and Innovative approach will position Mayo as a competitive location for indigenous business growth and secure further foreign direct investment for our County
MAYO.IE
COLABORATION
SUSTAINING JOBS
PROMOTION
COMMUNICATION
WINNING INVESTMENT
INDIGENOUS GROWTH

Lead Generation – Increasing the quality and quantity	Short Term 0-2 Years	Medium 2-4 Years	Long – Complete within 5 Years	Stakeholders
What: Develop in-house analytical programme / purchase of annual access to one recommended site • FDI intelligence • Business watch **Why:** Analytics conducted locally of financial trends and announcements will allow our team identify early international leads	✓			Mayo Co Co IDA Udaras na Gaeltachta
What: In association with Connect Ireland Initiative develop Mayo platform page on Mayo.ie promoting incentives associated with the scheme and be a point of contact for communities and potential connectors **Why:** Build the capacity of our communities to harness potential associated with the Connect Initiative		✓		Connect Ireland Mayo Co Co IDA Pilot communities

What: Systematic development of an FDI contact CRM database – partners, supporters, agencies, investors and others **Why:** Centralised database of FDI resources available to Mayo County Council for both advice in attracting new investment and promotion of our unique product	✓			Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC
What: Development of interactive Invest Promotion Material that can be used for exhibitions, conferences, expos and summits • Stand • Brochure • Video **Why:** Deliver a sustained and consistent message of the Invest Package available in Mayo and the resources available in the EIU	✓			Mayo Co Co
What: Prioritise events in key target areas / and geographical locations that will maximise the Invest potential a. Data Summit b. Energy conferences c. Importer expos d. Manchester and London (Ireland West access point) e. Economic Trade Links **Why:** Focus our efforts on areas determined in the Emerging Sectors Report and locations where economic relationships already established.	✓			Mayo Co Co

What: Primary networking • Careful identification of relevant networks, events and associations to target marketing material • Engaging with professional intermediaries locally and on our Invest databases, i.e. auctioneers, consultants, banking, etc. • Facilitate indigenous companies to carry Invest message on their sites and promotional material • EIU be the funnel for progressing identified 'leads' across the local authority • Consideration of a memorandum of agreement for cross-border cooperation with an EIU in a Northern Irish local authority **Why:** Relationships are the single most important determinant in securing future investment. Investing in relationship building is vital to sustain existing companies and attract new		✓		Mayo Co Co
What: Engage with Site selector consultants to address profile of Mayo as viable European headquarters **Why:** Where possible to access contact database for European and US site selectors for the dissemination of Invest Mayo message and follow up communications			✓	
Promoting Mayo as a location for Investment				
What: IDA Advance Building Solution – collaborate with IDA in promoting the advanced technology building to targeted sectors. Construct value propositions for locating in Mayo **Why:** Modern facility will potentially attract significant investment from the Life Science, Technology or Pharma industries coupled with considerable employment		✓	✓	IDA Mayo Co Co

What: Consolidate & publish local incentive scheme by Mayo County Council. What can we offer locally that is unique? • Key account management • Pre Planning Service • Communications • Flexible payment programme **Why:** Relationships are the single most important determinant in securing future investment. Investing in relationship building is vital to sustain existing companies and attract new		✓		Mayo Co Co
What: Development & publication of value propositions identified through our Emerging Sectors Report - fact sheets, funding available, sector profiles and data relevant to potential investors – renewable energy, tourism, food, ICT and creatives, etc. **Why:** Issue value propositions to contacts within each industry and promote sectors on Mayo.ie	✓			Mayo Co Co (EIU)
What: Preparation of feasibility studies to examine forestry and marine potential, sustainable fishing and air freight developments in the County **Why:** Develop evidence base for the marine and fishing sectors and to provide for additional freight capacity using the Ireland West Airport Knock.				Mayo Co Co (EIU)
What: Conduct skills audit of Mayo and the catchment environment in partnership with local and regional agencies **Why:** Existing enterprises or potential investors need to understand the employment opportunities available locally – qualifications, salary expectations, etc.		✓	✓	LCDC

What: Online Directory of Businesses and Real Estate directory of critical commercial sites **Why:** Illustrate visually the extent of business available in the County, facilitate networking and encourage local business to move 'online'. Position critical sites in context of access, infrastructure and skills available		✓		Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC
What: Publish list of Incentives available nationally/locally in Mayo – IDA, Tax Breaks, our support package **Why:** Succinct document that summarises financial support, tax incentives and local supports available. Although available to every city/county, Mayo, when promoting internationally can advance an overall package	✓			IDA Enterprise Ireland Udaras na Gaeltachta WDC Connect Ireland Initiative

PILLAR 2 - BUSINESS RETENTION & EXPANSION

	Short Term 0-2 Years	Medium 2-4 Years	Long - Complete within 5 Years	Stakeholders
Keeping our Companies and Encouraging Growth				
What: Systematic 'relationship building' with local indigenous companies •Compile current information on targeted employers across the County •Regular formal contact by Mayo Co Co with our larger employers in the County •Business recognition evening for larger employers •Deliver Bid Management Training for local SMEs •Develop supply chain opportunities at regional level Why: Sustaining current employers is vitally important. Both to maintain employment levels but also to illustrate a vibrant local economy.Improving relationships could also generate new leads	✓			Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC

What: Introduce 'Calls' to participate in economic clusters over the 5 Year period of this plan • Food • Digital • Financial • Tourism • Manufacturing • Energy • Entrepreneurship – Meet Mayo **Why:** Economic clustering encourages commercial collaboration and drives innovation. Mayo has a strong manufacturing cluster and a burgeoning 'Digital and Food Sector'.			✓	Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC
What: Research and develop innovative financial mechanisms for assisting indigenous companies to expand and for incentivising international companies to select Mayo for investment. **Why:** Generating creative mechanisms for attracting new investment and assisting our companies to grow will sustain employment and maintain a vibrant local economy		✓		Mayo Co Co (EIU)
What: Promote success of local companies through new communications initiative and in partnership with local media. Mayo.ie becomes the platform for celebrating Mayo business. **Why:** Continuously promote the success of Mayo-based companies internally within the County but also internationally using social media	✓	✓		Local Media Partners Mayo Co Co
What: Export Drive in Mayo - Focused promotion of exporting to include workshops, training and networking events targeting 10 growth companies in Mayo **Why:** Exporting from Mayo generates increased turnover and revenue. In turn this generates employment and increased sub-supply opportunities		✓		Inter Trade Ireland Enterprise Ireland Mayo Co Co

Support business networks in the County – Chamber of Commerce, Tourism Groups, Business Networks, etc. **Reason: Consistently address issues arising from stakeholder groups in the County.**		✓		Mayo Co Co LCDC
Infrastructure				
What: Advocacy Support – work with local interest groups to secure strategic infrastructure for Mayo and the West **Why:** Advocating on behalf of Mayo and its communities is a vital component to securing strategic infrastructure	✓			Local Interest Groups Mayo Co Co
What: Work with national and local stakeholders to ensure key economic infrastructure identified through our County Development Plan and other national strategies is achieved **Why:** Delivery of necessary modern infrastructure is critical but not essential to the success of Mayo companies. A number of priority projects have been identified and this strategy will assist in delivering these for Mayo		✓	✓	Mayo Co Co National, Regional and Local Stakeholders
Keeping our Companies and Encouraging Growth **What:** Systematic 'relationship building' with local indigenous companies • Compile current information on targeted employers across the County • Regular formal contact by Mayo Co Co with our larger employers in the County • Business recognition evening for larger employers **Why:** Sustaining current employers is vitally important, both to maintain employment levels but also to illustrate a vibrant local economy. Improving relationships could also generate new leads	✓			Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC

What: Introduce 'Calls' to participate in economic clusters over the 5 Year period of this plan • Food • Digital • Financial • Tourism • Manufacturing • Energy • Entrepreneurship – Meet Mayo **Why:** Economic clustering encourages commercial collaboration and drives innovation. Mayo has a strong manufacturing cluster and a burgeoning 'Digital and Food Sector'.			✓	Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC
What: Research and develop innovative financial mechanisms for assisting indigenous companies to expand and for incentivising international companies to select Mayo for investment. **Why:** Generating creative mechanisms for attracting new investment and assisting our companies to grow will sustain employment and maintain a vibrant local economy		✓		Mayo Co Co (EIU)
What: Promote success of local companies through new communications initiative and in partnership with local media. Mayo.ie becomes the platform for celebrating Mayo business. **Why:** Continuously promote the success of Mayo-based companies internally within the County but also internationally using social media	✓	✓		Local Media Partners Mayo Co Co

PILLAR 3 - INVESTMENT READY

Tailored Support Programme	Short Term 0-2 Years	Medium 2-4 Years	Long - Complete within 5 Years	Stakeholders
What: The EIU will develop a unique client based 'tailored support programme' for Investment Ready contacts. This will be published and promoted on Mayo.ie •Transport •Logistics •Financing •Communications •Pre-planning advice •Quality of life elements **Why:** The unique selling point for Mayo will be the delivery of a world class service from initial EOI through to development, construction and employment	✓			Mayo Co Co (EIU)
What: Our employees continue to be our most valuable resource in communicating our corporate message. We will utilise the strength of our teams and individual employees to communicate the Invest message to our clients and communities (both locally and internationally) **Why:** Mayo has worked hard to create a clear message of Visit, Connect and Invest. Our employees need to be the vehicle in the communities of that message and the supports available.		✓		Mayo Co Co (HR, EIU) LGMA

PILLAR 4 - PR, COMMUNICATION & PROMOTION

Our community	Short Term 0-2 Years	Medium 2-4 Years	Long - Complete within 5 Years	Stakeholders
What: Detailed list of Mayo diaspora in professional firms that can act as 'volunteer' lead generators. Distribute appropriate 'ask' to these individuals or companies in relation to sourcing new leads **Why:** Recommended by members in our diaspora, this unique initiative would clearly communicate the assistance required by our community, both at home and abroad.		✓		Mayo Co Co
What: Engage with indigenous companies to carry our new www.mayo.ie brand on their promotional material, both hard and soft resources. Anticipate 15 companies in Year 1 **Why:** The EIU wants to illustrate and promote a collaborative business environment that is welcoming and cohesive. This is one approach that will show the support of our vision by private industry.	✓			Mayo Co Co IDA Enterprise Ireland Udaras na Gaeltachta WDC

What: Develop site selector component to Mayo.ie with data and statistics relevant to decision makers **Why:** Easy access to required information and data by company decision makers on Mayo.		✓		Mayo Co Co
Material				
What: Launch our new brand www.mayo.ie and accompanying website as an immediate priority **Why:** Mayo is poised to introduce a unique new branding and web presence in Mayo.ie. The concentration of effort on this platform will allow us communicate a shared vision of Mayo, resources available, opportunities on hand, and properly market the County internationally for the first time	✓			Mayo Co Co
Comprehensive marketing strategy implemented under the Invest Pillar of Mayo.ie • Hard copy Invest brochures • Value propositions for each sector as .pdf • Short video highlighting the economic assets available in the County • Jpeg marketing elements for social media – images, economic maps, etc. • Interactive stand for exhibitions, events, etc. **Reason:** Develop a coherent and consistent message of available resources and opportunities for growing your business here or new investments	✓	✓		Mayo Co Co (EIU)

Oifig Fiontair Áitiúil
Local Enterprise Office

MAYO.IE