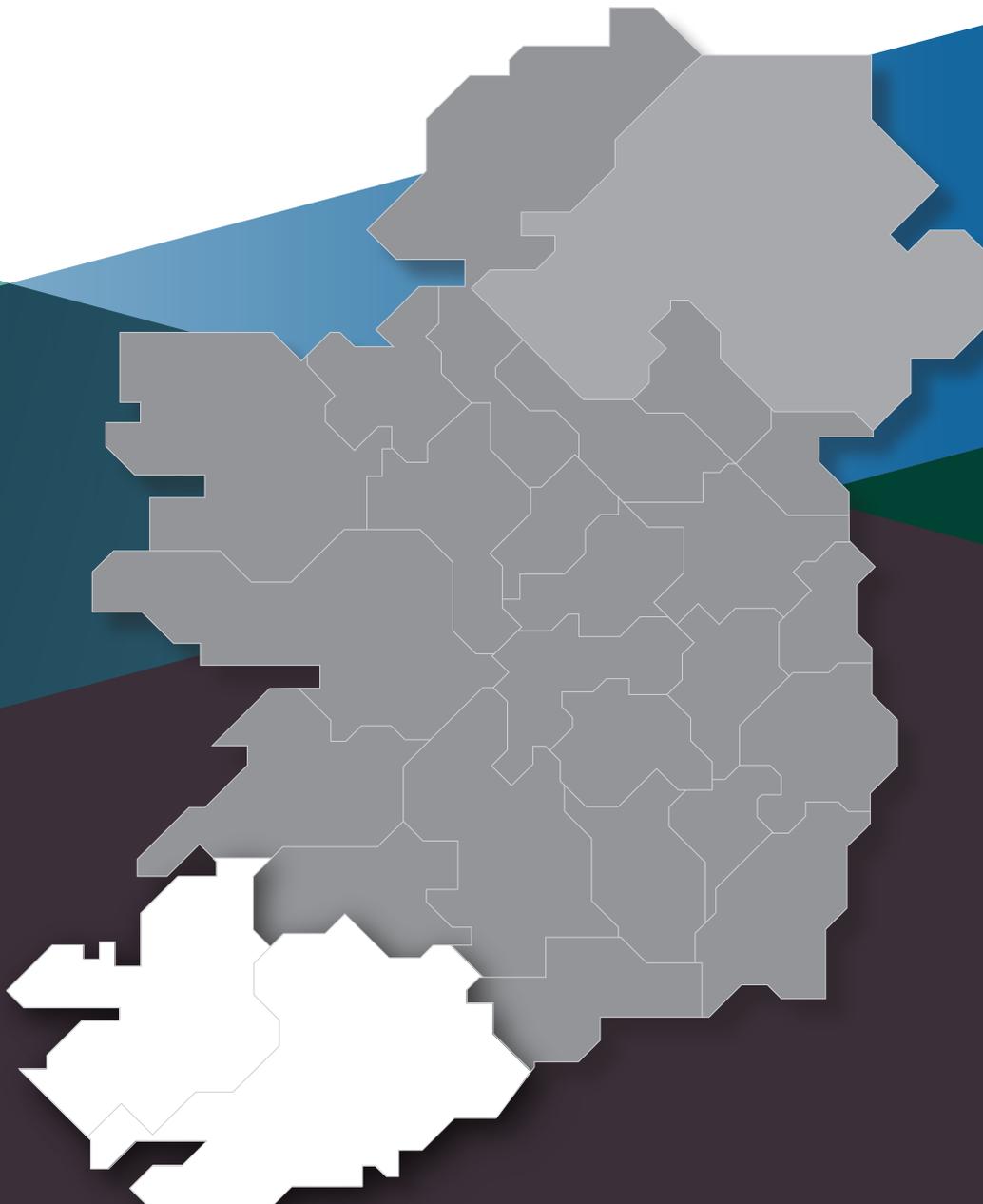Rialtas na hÉireann
Government of Ireland

Regional Enterprise Plan to 2020
SOUTH-WEST

An initiative of the Department of Business, Enterprise and Innovation

Regional Enterprise Plan to 2020
SOUTH-WEST

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Minister's Foreword

Realising the enterprise and jobs potential in all of the regions and thereby reducing disparities between regions continues to be a priority of this Government. We remain committed to achieving an overall jobs uplift of between 10 and 15 percent in each region by 2020 and to bring and/or maintain unemployment levels in each region to within at least one percentage point of the State average.

In the South-West region, the 2015-2017 Regional Action Plan for Jobs (RAPJ) set out 260 actions to support job creation and accelerated economic recovery. At the end of that period, more than 193 actions were completed or substantially progressed, and more than 38,900 jobs have been created in the region. With an unemployment rate currently at 4.9 percent much has been achieved.

This *Regional Enterprise Plan* (REP) for the South-West aims to build on the strong progress achieved under the RAPJ initiative towards our 2020 ambition. Under the refreshed approach, I have placed a renewed emphasis on collaboration and delivery on measurable actions. I have also stressed additionality and asked the Regional Committees to bring forward and elevate ideas that, through collaborative working, complement and add value to the core work of the enterprise agencies and other bodies. The Plan is therefore deliberately selective and 'bottom-up' in terms of its strategic objectives and not intended to be a comprehensive regional enterprise strategy in its own right.

I have been very pleased to note that in preparing this REP, the South-West Regional Implementation Committee (along with the other eight Regional Committees nationally) has engaged in a regionally co-ordinated manner on important considerations to do with strengthening productivity, driving job creation, and supporting enterprise resilience in their region. These include: diversifying the regional economy, building on place-specific strengths, regional brand development, business clustering and ecosystem strengthening initiatives to support new business creation and investment.

I look forward to seeing a further strengthening of the collaborative mindset that has grown in the South-West and in each region, bringing together Local Authorities, the enterprise agencies, higher and further education institutions, Local Enterprise Offices, the business community, and others, to work towards a better future for their region.

As we look towards 2020, it is clear that the context for enterprise development in Ireland has changed. Unemployment levels in all regions are now at more stable levels, but we have some new challenges; the forthcoming departure of the UK from the European Union will have far reaching impacts as yet not fully known; while our competitiveness is challenged by a tightening labour market and unrealised productivity potential, especially in our Irish-owned SMEs.

My Department's *Enterprise 2025 Renewed*, has oriented our enterprise policy towards building resilience in our enterprise base so that our businesses and our economy more generally can withstand new challenges and realise sustained growth and employment creation for the longer-term. Together with the Department of the Taoiseach, we are defining a whole of Government *Future Jobs Ireland* agenda that will

give effect to that policy focus, with key actions to drive productivity growth and innovation, build enterprise resilience, increase participation in the labour force, and enable businesses to transition to a low carbon economy context. In addition, through *Project Ireland 2040* we will make sustained investments in place-making so that Ireland remains an attractive place to live, work and invest over the longer term.

Every region has a part to play in realising sustained enterprise and economic performance; and no region should lag behind their potential. This refreshed South-West Regional Enterprise Plan, one of nine regional plans, sees the RAPJs evolve to a more strategic, focused approach, in line with and complementing these policy developments at the national level. Through the established mechanism of the Regional Steering Committee, these Plans will be maintained as 'live' agendas so that new ideas and collaborative initiatives can be propagated, and national policy initiatives can be effectively translated into regional impact; for example, in areas such as climate action and the digital economy.

Under my Department's €60 million competitive Regional Enterprise Development Fund (REDF) the South-West has already secured more than €10 million across ten projects that will enhance the region's potential for enterprise growth and job creation. Guided by this new Regional Enterprise Plan, the region is well positioned to compete for further competitive calls, including the REDF, on a rolling basis, as part of the further roll-out of *Project Ireland 2040*.

I want to commend the work of the Implementation Committee under the chairmanship of Mr Bob Savage, Vice President Centres of Excellence, Dell EMC, for their work on the roll out of the first RAPJ for the South-West region. I welcome the new focus and energy embodied in this refreshed Plan for the region and recognise the extensive collective reflection and effort that has gone in to its production. I wish the region well in delivering it under the chair of Dr. Adrienne Harrington, Chief Executive of the Ludgate Hub.

My Department will continue to work closely with you as you implement the agenda set out and seek to realise the potential that you have recognised. I look forward to engaging with you over the coming months and supporting you in your endeavours.

Heather Humphreys TD

*Minister for Business, Enterprise and Innovation
March 2019*

Chair's Introduction

As Chair of the South-West Regional Enterprise Plan Steering Committee, I am pleased to present our Plan for the period 2019-2020.

I was honoured to be asked by Minister Humphreys to take on the role of Chair last October, and since then, I've been struck by the energy and commitment shown by members of our Committee in bringing this Plan together.

Our new Plan reflects a vision for Kerry, Cork city and Cork county that is not just about delivering the core objectives that we have highlighted, but through collaboration, building on and strengthening the culture of enterprise development in the South-West that is key to ensuring vibrant and sustainable communities.

This new Plan was not developed in isolation. As a Committee, we are aware that the original plan will continue to be a resource for us. Many of the 261 actions that were set out in that Plan were achieved or substantially achieved and have paved the way for the objectives set out in this Plan.

In drafting this Plan, our aim was to focus on a smaller number of strategic objectives that we believe can, through collaboration, best support growth in the region, capitalising on our strengths here in the South-West. We were also conscious that our three Local Authorities as well as the enterprise and other agencies already have an extensive range of plans and areas of co-operation in place, including participation in complementary initiatives such as the Atlantic Economic Corridor.

This document is not intended to replace these, or duplicate strategies set out elsewhere. Rather our aim is to add value through this new Plan, complementing the work being undertaken across the region. We also see that many of the actions set out in this Plan will serve to lay the foundations on which future plans can be built.

The South-West has many advantages and strengths as a region, with strong industry presence and track record in areas including but not limited to pharma, medtech, engineering, agritech and food, financial services, tourism and natural resources. We offer a wonderful place to live, work and visit, of which we are justifiably proud.

We are also conscious of the challenges that we face, both as a region and a country. Connectivity in all its forms is key to continued economic development and job creation. The availability of high speed broadband will be critical in ensuring access to the marketplace. We must also continue to invest in key infrastructural projects that will assist the region in delivering on our objectives. Because of our geographical remoteness, the South-West suffers from very specific imbalances which makes accessing international markets and attracting tourism more difficult. It is important that employment and the economy is protected and specific resources should be allocated where there is a specific need and where existing infrastructure and capabilities could be further utilised and enhanced. The committee strongly supports all initiatives, including those under Project Ireland 2040, to examine in particular the availability of

and support for additional flight routes from the region, including international PSO options from regional airports.

As is the case across all regions, we face a challenge when it comes to the availability of skills and talent. The Committee strongly supports the excellent work of the Regional Skills Forum and will continue to work with and support the Forum and the further and higher education institutes over the coming years to deliver the skills necessary to ensure continued growth in the region. Developing sustainable, thriving and vibrant communities, especially outside our main population centres, is key to regional success and we support any specific action to increase population in these areas and to support a more regionalised economy.

Developing strong, ambitious businesses capable of growing while also managing future shocks and challenges is becoming increasingly important for the South-West region. The UK's decision to leave the EU, for example, is likely to have serious implications for Irish businesses in the near and long term. Ambition and resilience will be key to sustainability and, here in the South-West, we need to ensure that both established and newer businesses are supported and where necessary, work with them to manage the adoption of new and emerging technologies.

Additionally, the Committee recognises the funding awarded to projects across the region under the Regional Enterprise Development Fund, and we will work with these project owners and Enterprise Ireland to ensure that they have appropriate supports in place and that their ambition and impact can be realised to the full. The Committee will also look at projects which were not successful and see how they may be progressed.

I would like to sincerely thank the members of the Committee for their support over the recent months, and for their time and commitment in bringing this Plan to publication. Working together over the coming two years to deliver on these actions will further strengthen the culture of collaboration across the region that was evident in preparing this Plan and I look forward to us working together to further the region as a whole.

Dr. Adrienne Harrington
Chief Executive
Ludgate Hub

Chair
South-West Regional Enterprise Plan

1 Policy Context

The South-West Regional Enterprise Plan (REP) is one of nine such Plans that have emerged from a process to refresh and refocus the Regional Action Plan for Jobs (RAPJ) initiative which originally focused on the 2015-2017/8 period. The purpose of the refresh and refocus was to further build on the positive regional collaboration fostered by the RAPJs over the period to 2020, taking account of the changed and improved economic circumstances nationally, the emergence of new challenges to enterprise development and competitiveness both domestically and internationally in origin, including Brexit, and the persistence of uneven economic progress across the regions in Ireland - as of Q3 2018 there were three[1] regions with rates of unemployment more than one percent above the State average of six percent.

The REPs provide perspective and ideas from the 'ground-up'. They are informed by an understanding of unique local strengths and assets and have the potential to enable more effective translation of national policy into regional and local impact[2]. They focus on leveraging the added value from regional and local actors working collaboratively, and in so doing, they aim to complement and build on the existing activities being undertaken by the Enterprise Agencies, the LEOs and the wider range of State Bodies directly involved in supporting enterprise development in the regions (see Chapter 3 on Enterprise Agency and LEO activities and Appendix 4). As a result, the Plans are focused on a suite of selected priority objectives requiring a collaborative regional effort and are not meant to be comprehensive economic development strategies on their own. The Regional Steering

Committees will oversee these Plans as 'live' agendas. Through them new ideas and collaborative initiatives can be propagated and national policy initiatives can be effectively translated into regional impact; for example, in areas such as climate action and the digital economy.

The REPs are an integral part of the broader policy system aimed at driving economic growth and sustaining better standards of living throughout Ireland. As a 'bottom-up' initiative, the Plans complement national level policies and programmes emanating from the 'top-down' (see Figure 1) and in particular, there is strong alignment with Ireland's national enterprise policy, *Enterprise 2025 Renewed.*

Enterprise 2025 Renewed aims to embed resilience in our enterprises, contributing to strong economic performance over the longer term, through a number of key policy priorities. These include:

- an increased emphasis on developing our Irish owned enterprises – enhancing productivity and delivering quality jobs – and helping companies to navigate Brexit;

- exploiting the potential offered by collaboration and clustering within our distinctive foreign and Irish owned enterprise mix;

- placing a spotlight on innovation (including disruptive technologies) and talent development, so that more enterprises are developing new products, services and solutions, and are more competitive internationally;

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1   Midlands 7.1% | Mid-West 7.2% | South-East 8.6%

2   Appendix 2 contains a brief regional profile and statistical snapshot of the South-West
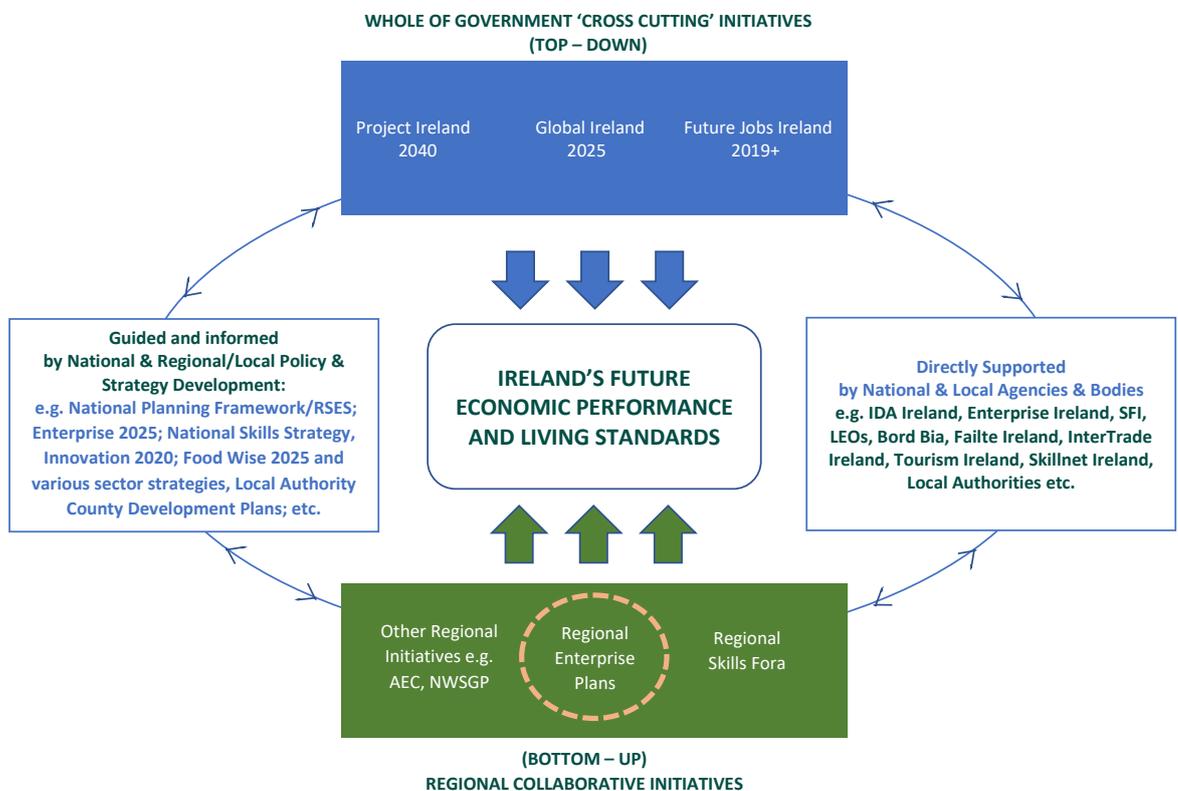
- realising the full potential of our regions – developing places that are attractive for business investment and for people to live and work; and

- raising Ireland's visibility internationally, protecting Ireland's reputation, and providing opportunities for our enterprises supported by the Global Footprint 2025 initiative.

At the national level, the recently launched *Future Jobs Ireland 2019* initiative will, as part of a multiannual framework, give effect to national enterprise policy objectives and leverages a 'whole of Government' approach so that all policy levers at the national level, relevant to job creation and labour force participation, talent development, enterprise growth, innovation and competitiveness, and transition to a low carbon economy, are engaged on an agenda that will prepare for Ireland's future enterprise and economic needs. The coming together of public and private sector stakeholders

to set regional strategic objectives for enterprise development under these refreshed Regional Enterprise Plans will have an important role to play in the realisation of *Enterprise 2025 Renewed* and the ongoing *Future Jobs* agenda.

The REPs also have a strong role to play in the context of *Project Ireland 2040*, and more specifically in the implementation of the National Planning Framework and its constituent Regional Spatial and Economic Strategies (RSESs) at NUTS 2 (Regional Assembly) level. The refresh of the Regional Action Plans has informed and will continue to inform the implementation of these future planning strategies for Ireland (see Appendix 5 on *Project Ireland 2040* for further details). The RSESs will be key to addressing longer term strategic planning and infrastructural requirements that will be needed to unlock the potential in all regions recognised in the REPs.

Figure 1

WHOLE OF GOVERNMENT 'CROSS CUTTING' INITIATIVES
(TOP – DOWN)

Project Ireland 2040   Global Ireland 2025   Future Jobs Ireland 2019+

IRELAND'S FUTURE ECONOMIC PERFORMANCE AND LIVING STANDARDS

Guided and informed by National & Regional/Local Policy & Strategy Development: e.g. National Planning Framework/RSES; Enterprise 2025; National Skills Strategy, Innovation 2020; Food Wise 2025 and various sector strategies, Local Authority County Development Plans; etc.

Directly Supported by National & Local Agencies & Bodies e.g. IDA Ireland, Enterprise Ireland, SFI, LEOs, Bord Bia, Failte Ireland, InterTrade Ireland, Tourism Ireland, Skillnet Ireland, Local Authorities etc.

Other Regional Initiatives e.g. AEC, NWSGP   Regional Enterprise Plans   Regional Skills Fora

(BOTTOM – UP)
REGIONAL COLLABORATIVE INITIATIVES

2 South-West Regional Enterprise Plan to 2020

STRATEGIC OBJECTIVES

STRATEGIC OBJECTIVE 1:

Build capability and resilience in the region's enterprise base

STRATEGIC OBJECTIVE 2:

Develop the region's enterprise hubs

STRATEGIC OBJECTIVE 3:

Leverage the opportunities offered through business clustering to drive enterprise performance and resilience in the South-West (including a focus on building internationalisation capability amongst indigenous companies)

STRATEGIC OBJECTIVE 4:

Increase the capacity of the tourism sector through skills development and seasonal extension, and ensure that the region's natural heritage, culture and living landscapes are appropriately managed and protected

STRATEGIC OBJECTIVE 5:

Support growth in the region's marine and maritime sector

STRATEGIC OBJECTIVE 6:

Ensure the availability of skills and talent to underpin the region's economic growth potential

STRATEGIC OBJECTIVE	1

Build capability and resilience in the region's enterprise base

CONTEXT

Developing strong, ambitious and resilient start-ups and small businesses capable of growing while also managing future shocks and challenges is becoming increasingly important. The UK's decision to leave the EU, for example, is likely to have serious implications for Irish small businesses in the near and long term. These impacts, however, are difficult to define for the range of companies in this cohort; for example, not every company needs to internationalise in order to develop and grow. Nevertheless, according to the 2017 Global Entrepreneurship Monitor, most nascent entrepreneurs and new business owners in Ireland 'have an international orientation in that they expect some revenues from international customers' – with just one in four expecting to have no revenue from customers outside Ireland. Building resilience includes the need to ensure established and new businesses in the region are supported, where necessary, to manage the adoption of new and emerging technologies, and transition to a low carbon economy. This applies to those located in peripheral areas of the region as well as in the larger population centres. Advanced technologies are becoming increasingly important in the evolution of traditional industries, such as cyber-physical systems and IoT (Internet of Things) networks. Enterprise 2025 Renewed highlights disruptive technologies as one of the most significant global changes for Irish enterprises, requiring an acceleration in the speed at which technological advances are adopted

The pace of this technological change is driving the emergence of new global business models, markets, products, sectors and activities, in addition to changing existing models of working and driving new skills needs. While this presents a challenge, it is also a significant opportunity.

In the South-West, industry sectors with a strong presence and track record such as pharma, medtech, engineering, financial services, agritech, tourism, manufacturing, renewable energy and food are changing as a result of emerging technologies. There is an opportunity to promote and support the adoption of these technologies among established companies in the region, in order to meet emerging challenges in industry, such as the need for increased efficiency, shorter production chains, and increased flexibility.

Adoption of disruptive technologies among the region's enterprises can be supported through improved deployment of expertise within HEIs and research institutions, increasing the uptake of innovation-related incentives, promoting and showcasing new technologies, and working with businesses to develop suitable skills pipelines.

VISION TO 2020

Improve survival rates among businesses in the South-West region and position the South-West as a leader for the adoption of new and emerging technologies among its enterprise base.

KEY ACTIONS TO 2020

Action 1:

Design and deliver a pilot 'Hack-a-Team' initiative as an additional means to providing resources to early stage companies/ enterpreneurs. The initiative will be focused on building a team around potential projects and promoters with a view to funding the model, rather than funding the applicant, to assist the applicant for a defined period of time to develop, strengthen, and test their business idea. The pilot could be developed with focus on a particular sector.

Timeframe for delivery Q4 2019

How will delivery be measured?
Delivery of pilot; survival rate improvement

Responsibility: South-West LEOs

Action 2:

'Showcase' advanced technologies, including the establishment of 'Smart Village/Town' pilot sites, in the region. This 'showcase' of advanced technologies and their industry applications will be delivered in the South- West, targeted at relevant sector(s) for the region.

Timeframe for delivery Q2 2020

How will delivery be measured?
Delivery of showcase

Responsibility: Enterprise Ireland, IDA, Local Authorities, HEIs, Local Development Companies, Industry, Chambers and other stakeholders

Action 3:

Assess upskilling needs and knowledge transfer/strengthening opportunities in relevant sector(s) to support the adoption of advanced and disruptive technologies in the South West, in particular those pertaining to the transition to a low carbon economy

As part of the work of the South-West Regional Skills Forum (Strategic Objective 6), companies in sectors undergoing, or with the potential to be disrupted by, technological transformation, will be given priority in order to understand emerging skills needs and the ability of current services/training programmes to meet these.

Timeframe for delivery Q4 2019

How will delivery be measured?
Companies selected; skills needs mapped (through Skills for Growth and the EXPLORE programme)
Assessment and feasibility of knowledge transfer opportunities complete

Responsibility: Higher Education Institutes, EIs, Local Authorities, Enterprise Ireland, IDA, Regional Skills Forum, Kerry Education Training Boards and other stakeholders

Action 4:

Support the development of key strategic sites within the region so as to ensure capacity for enterprise development and growth, in particular the targeting of brown field sites in urban areas.

Timeframe for delivery: Q4 2020

How will delivery be measured:
Linked to specific project identification, to be determined by the Regional Steering Committee

Responsibility: Local Authorities, industry, IDA, EI

STRATEGIC OBJECTIVE 2

Develop the region's enterprise hubs

CONTEXT

The South-West has the largest economy outside of the Dublin region and is also the largest rural economy in the country with annually increasing economic activity in industrial, research and innovation, and business development activities. Cork and Kerry counties are diverse, with important regional towns; significant national, international and global leading companies; a tourism industry of both national and international significance; and a landscape of outstanding beauty and rich in culture and heritage. However, there are a significant number of challenges facing the South-West regional economy, not least attracting and keeping talent, its peripheral location and declining populations of communities located remote from the major regional centres, longer commute times, and uneven broadband availability, to mention some.

In order to address these key challenges, a new way of working will need to be considered in order to sustain the continued growth of the rural economy into the future. There is a strong need to future proof the economy in the South-West Region. Key elements of future proofing the economy to ensure it maintains its competitiveness include the ability to progress and manage technological change, and delivering critical infrastructure which contributes to a high quality of life and quality employment in rural areas which can attract and retain talent and innovation, thereby sustaining rural economies and communities.

Central to meeting these challenges will be the realisation of a regional network of Digital Innovation Hubs to promote and facilitate remote working, hub-working, co-working and indigenous job creation through innovation and entrepreneurship.

The South-West region currently hosts a vibrant digital enabled innovation ecosystem comprising of many players in business, academia, government and research. The potential for job creation within this sector is recognised, creating a fertile pipeline for quality job creation. There are a significant number of private and publicly funded digitally enabled co-working facilities in the South-West region. A contribution to expanding the pipeline of new start-ups is to continue to develop 'best in class' hubs that support and strengthen start-ups and small businesses.

The development of 'RDI Hub' to become a world class centre for design-led, digital innovation in Killorglin, Co. Kerry with the support of the Regional Enterprise Development Fund (REDF) is a significant initiative for the region in this regard. The Hub, a not for profit partnership between private enterprise (Fexco), higher education (IT Tralee), and Kerry Co. Council aims to build on the region's strengths as a globally connected financial services and entrepreneurial hotspot, supporting Irish and international talent by fostering a design-led living lab ecosystem offering training, accelerator programmes and innovation services to entrepreneurs, and new and established companies.

As Ireland's first rural digital hub, Ludgate in Skibbereen has engaged with more than 50 towns and villages across Ireland who have visited in the past 2 years. On foot of that activity, and with the

support of REDF, Ludgate intends to formalise this by establishing a Hub Academy to advise and mentor towns at the conception/development stages. They will lead a network of Irish digital hubs, allowing for the sharing of accumulated wisdom and best practice for job creation in rural Ireland, as well as providing a conduit for government consultation with the growing number of hubs.

In the context of and informed by this ongoing work, there is an opportunity in the South-West region to investigate how 'clustering' of hubs can be achieved in practice; the creation of a network among some or all of the existing hubs and spaces in Kerry and Cork will be investigated as a means to apply best practice learning, further development, referrals and linking of services.

Furthermore, developing a network of these facilities would further enhance the job creation potential in the rural economy through innovative remote and co-working concepts. More critically however, the Regional Network could leverage existing supports to develop future opportunistic synergies between all the market players, creating economies of scale and consistency of approach. Most importantly, a Regional Network of Rural Digital Innovation Hubs in the South-West will build economic resilience in towns and communities and serve to halt population decline in rural communities.

VISION TO 2020

South-West region leading on 'best practice' for enterprise hub development nationally.

KEY ACTIONS TO 2020

Action 1:

Establish a network among the South-West's Tech and Enterprise Hubs.

Hubs in the region to be invited to join a learning network that will facilitate innovation, best practice learning and development of services. This action may focus on particular categories of hubs, e.g. co-working hubs and/or themes around identified regional challenges. As part of this action, further develop the relationship between third level programmes in the region that support recent graduate entrepreneurs to develop start-up ideas, and tech and enterprise hubs in the region.

Timeframe for delivery Q2 2019

How will delivery be measured?
Network established

Responsibility: Hub representatives, REP Steering Committee (especially Higher Education Institutes, Local Authorities, Chambers) and other stakeholders

Action 2:

Best practice sharing among Tech and Enterprise Hubs in the region.
Examples of best practice activity and service provision to be highlighted and shared among network members. As part of this action, service users in network member hubs to be surveyed with a view to providing information on needs and potential areas for further action/development.

Timeframe for delivery Q4 2019

How will delivery be measured?
Best practice model established

Responsibility: Hub representatives, Higher Education Institutes, REP Steering Committee, and other stakeholders

Action 3:

Showcase best practices locally and internationally to Tech and Enterprise Hubs and provide a conduit for connecting member firms across these entities.
Development of a best practice showcase (with international inputs) and facilitate both B2B introductions and research connections between Tech and Enterprise Hub members and academia in order to promote collaboration and innovation through solid connections regionally, nationally and internationally.

Timeframe for delivery Q4 2019

How will delivery be measured?
Best Practice Sharing seminar held

Responsibility: Hub representatives, Higher Education Institutes, REP Steering Committee, and other stakeholders

Action 4:

Assess the potential for a remote working initiative targeting particular sectors/companies.

Timeframe for delivery Q4 2019

How will delivery be measured?
Scoping plan delivered

Responsibility: Local authorities, South-West LEOs, Enterprise Ireland, IDA, Údarás na Gaeltachta

STRATEGIC OBJECTIVE | 3

Leverage the opportunities offered through business clustering to drive enterprise performance and resilience in the South-West (including a focus on building internationalisation capability amongst indigenous companies)

CONTEXT

Clustering initiatives are variously described but are generally focused on creating linkages between organisations and stimulating collective action with the aim of enhancing the enterprise environment for mutual benefit of members.

They can provide a vehicle for learning, collaboration, and sharing of best practice in a particular industry or sector, in addition to the development of best practice that can be shared at a broader level. They can also act as a collective voice that can represent the strengths, needs, and interests of a particular sector or industry.

Enterprise 2025 Renewed points to the opportunities to be gained through a focus on collaboration, connections and clustering, within our distinctive foreign and Irish owned enterprise mix, which can deepen resilience and stimulate sustainable growth in Irelands regions.

In the South-West, industry sectors with significant concentrations of employment exist in financial services, agritech, agri-food, pharma, medtech, ICT, engineering, tourism/hospitality, and manufacturing, whilst sectors such as, cyber security, renewable energy, maritime and the marine are expanding. There is an opportunity to promote and support clustering as an economic development and enterprise capability development tool to support regional growth, and to forge greater linkages and collaborations amongst the plethora of indigenous and foreign owned enterprises across the region, and beyond.

A number of enterprise-led clustering and networking initiatives are already underway in the South-West region, including:

- **Cyber Ireland:** In December 2018, an initiative to establish a national cybersecurity cluster, hosted in Cork, was announced. Facilitated by Cork Institute of Technology (CIT), the cluster is supported by IDA Ireland. It will aim to provide a collective voice to represent the needs of the cyber security sector across the country and will address key challenges including: skills needs, research, internatiionalisation, and the development of a national community which connects industry, academia and government.

- **Energy Cork:** an industry-driven cluster, conceived by Cork Chamber, pursuing coordinated actions to strengthen enterprise and employment within the energy sector in the Cork region; supported by Cork City Council and Cork County Council through their Economic Development Funds

- **IT@Cork:** a not for profit organisation representing the Tech sector in Cork. It has over 300 member companies. The organisation hosts conferences, events, and networking opportunities for its members, with the aim of supporting collaboration and innovation and enabling the growth of the Tech sector in Cork.

- **Cork Financial Services Forum:** comprises over 20 representatives from businesses operating in the International Financial Services sector in the Cork region, as well as the third-level institutes and the local agencies that support the development of economic growth in the region. The IFS sector in Cork has grown over the past ten years, and there is now a significant concentration of companies in the region that represent a broad spectrum of financial services disciplines including: back office processing; fund administration; transfer agency; middle office settlements; distribution and asset servicing; trustee/depository; risk & compliance; financial reporting & audit; asset management operations.

- **KerrySciTech:** was established on a collaborative basis by local industry, Institute of Technology Tralee and Kerry County Council to drive coopetition and deliver strategic advantage for its member companies, with the primary aim of promoting and highlighting Kerry as a science and technology hotspot and allowing cluster members to mutually benefit in the search for talent due to the pooling of resources and shared web portal to advertise science and technology jobs in the region. It is an exciting and innovative approach by companies in Kerry in their endeavours to source and retain appropriately qualified personnel to work in the areas of science and technology across a spectrum of companies and sectors.

- **Creative and Food networks:** Networks have been established in Cork and Kerry to support the Craft and Food sectors. Producers work together both on a county and regional basis with ongoing agency support. These networks are an essential fora for agency information extension and specific delivery of programmes and support.

While these are primarily sector-driven initiatives, *Enterprise 2025 Renewed* also points towards an approach whereby a clustering initiative is not necessarily driven by sector specialisation, but by identified 'challenges' or the need to develop solutions to address a 'problem statement'. This can be a way to encourage more dynamic and innovative cross-sectoral and multi-disciplinary groupings, and engagement with disruptive technologies.

As an international exemplar ACCIÓ, the Agency for Business Competitiveness in Catalonia, sees clusters as the perfect environment to gather strategic sectorial knowledge, to connect companies locally and globally, and to develop collaborative projects. ACCIÓ believe that hybrid cluster collaborations can encourage cross sectoral collaboration and problem solving and on a quarterly basis they bring together 28 cluster managers for development and training workshops. Many opportunities to generate disruptive innovation arise from these interactions.

There is potential in the South-West for the creation and strengthening of business clustering initiatives to embrace training, internationalisation, research and development, that leverages demonstrated strengths in other sectors (such as tourism & hospitality) and exploring their application for companies developing into export markets. Other opportunities for exploration by the Committee include exploring best practice examples of sector clustering from other industry areas and regions, with the aim of securing competitive advantage for these sectors and increasing job creation potential in the region.

The concept of 'innovation districts', defined as geographic areas where leading-edge anchor institutions and established companies cluster and connect with start-ups, business incubators, and accelerators, has been applied as a new urban model for regeneration e.g. Kendal Square, Cambridge. Innovation districts can encompass a large geographic foot print, integrating multi-institutions, properties and stakeholders. It is important that the region embraces such models, contextualized for the unique attributes of the South-West

VISION TO 2020

The South-West region will be an exemplar of best practice and innovation in the area of business clustering focused on its key sectoral strengths and capabilities.

KEY ACTIONS TO 2020

Action 1:

Action Learning Workshop on clustering development and practice.

Organisation of a regional workshop and action learning event for industry, academia and policy makers to showcase and examine best practice cluster initiatives, and their development from across the globe. The workshop will also explore opportunities to foster the development of new clustering initiatives in the South West focused on areas such as SME internationalisation, innovation districts, disruptive technologies, and transition to a low carbon economy.

Different international practices relating to clusters, cluster organisations, cluster initiatives and the role of Government/local authorities will be outlined and discussed. The workshop outcomes will be used to inform cluster policy development at the national level.

Timeframe for delivery Q4 2019

How will delivery be measured?
Delivery of workshop
Identification of new clustering initiative opportunities for the region

Responsibility: Higher Education Institutes, Cyber Ireland, ecoRIS3 project, Chambers and other regional stakeholders

Action 2:

Develop cross sectoral collaboration and market access strategies amongst the emerging clusters both regionally and nationally.

Organise a cluster manager connection workshop for representatives of clusters from across the nine regions to scan for cross sectoral collaboration, new market exploration, regional marketing, recruitment and R&D opportunities.

Timeframe for delivery Q1 2020

How will delivery be measured?
Delivery of a workshop
Establishment of Cluster Managers Forum
Collaboration agenda developed

Responsibility: Higher Education Institutes, with the support of REP Committee and other relevant regional stakeholders

Action 3:

Undertake an examination of the current suite of supports and advice available to businesses in the South-West who want to grow their international reach, and convene an industry focus group to explore opportunities to strengthen the offering so as to increase the performance of the region's indigenous businesses.

Timeframe for delivery Q4 2019 (analysis complete)/Q2 2020 (focus group convened)

How will delivery be measured?
Gaps and opportunities identified for enhancing support to SW businesses who want to expand internationally and new initiatives under development

Responsibility: REP Steering Committee members (contributing to analysis and hosting of Focus Group)

STRATEGIC OBJECTIVE	4

Increase the capacity of the tourism sector through skills development and seasonal extension, and ensure that the region's natural heritage, culture and living landscapes are appropriately managed and protected

CONTEXT

Tourism and hospitality is a significant employer in the South-West region, with 28,400 people employed in accommodation and food service activities, making up nearly nine percent of the total workforce (CSO Q3, 2018). Development of the tourist product in the region also makes an important contribution to enhancing the quality of life and attractiveness of the South-West as a place to live and work. It is important that this economic benefit is protected and fostered by ensuring that the distinctive resource base of landscapes and seascapes, as well as the very rich culture and heritage of the region is appropriately managed for the benefit of both residents and the visitor population.

The South-West is particularly well-placed to attract the so-called 'Great Escaper and Culturally Curious' segments of the tourist market who among other things are looking for authentic areas of discovery, cultural insights, good food, history & natural beauty for an inspiring & unusual experience. The South-West also contains the only gold-star dark sky reserve in the Northern Hemisphere, an area uncontaminated by artificial lights, and is full of cultural and heritage sites.

According to 2017 data, the South-West attracts the highest numbers of overseas visitors after Dublin, with nearly 2.5m tourists travelling to Cork and Kerry - and generating €968m in revenue (Failte Ireland). Indeed, tourism makes a disproportionately large contribution to the enterprise mix and employment in Kerry. Annual visitors to the county are estimated at a ratio of 12 to 1 in relation to the resident population in Kerry, compared to 4 and 5 to 1 in Cork and Limerick respectively.

However, there can be a high level of seasonality associated with this employment, particularly outside the larger cities and key destinations. In general, 67 percent of holidaymakers staying over four nights in Ireland are present between June and September. (Fáilte Ireland).

The significant influx of visitors to the South-West in comparison to other regions also has major implications for the infrastructure needs of the region, particularly intra-regional transportation links, water/waste water infrastructure and the supporting network of facilities, public toilets, car parks, access routes etc. required to adequately serve the natural attractions of the region, many of which are located in peripheral areas.

The South-West region has developed tourism strategies whose vision is to maximise in a sustainable manner tourism's contribution to the quality of life, economy, employment and local community development of the region, paying particular attention to nurturing the natural, built and cultural heritage.

The overall objectives are to increase the number of visitors and their time spent in the region, but to do so in a manner that is sustainable; to increase the tourism season across the region, especially in areas where the tourism season is short; to increase the number, breadth, depth, and quality of the tourism experiences across the region; and to encourage tourists to return to the region in the future, based on their previous positive experience.

Opportunities exist both to support employees relying on a short season of employment to find alternative work off season, and to use the value of this workforce to the benefit of other businesses in the region. The opportunity also exists to explore options for extending the tourism season, by supporting businesses in the sector to develop alternative products for shoulder periods.

There is also an opportunity to build on the region's significant track record in the sector through the development of a Centre of Excellence for tourism/hospitality training in the region, further developing its profile in the sector.

The REP Steering Committee will continue to support the further development of tourism infrastructure projects in line with Regional Tourism Strategies, including for example, Greenways, Blueways, built infrastructure, access routes, and supporting public infrastructure.

VISION TO 2020

Maintain the South-West's prominence as a destination for overseas visitors, and develop the region into an exemplar for hospitality skills and training.

KEY ACTIONS TO 2020

Action 1:

Investigate potential for a tourism/hospitality training Centre of Excellence in the region.
This action will be explored by the REP Steering Committee in the context of the planned merger of ITT and CIT

Timeframe for delivery Q4 2019

How will delivery be measured?
Feasibility undertaken

Responsibility: ITT, CIT, Local Authorities, LEOs, Regional Skills Forum, Kerry Education Training Boards

Action 2:

Work with West Cork and Kerry to unlock the economic growth potential of the area by progressing a range of key initiatives that will motivate and facilitate potential tourists to visit and stay in the local area through the implementation of the Visitor Experience Development Plans (VEDPs).

VEDPs have been developed for Ballydehob to Kenmare, Skellig Coast, Dingle Peninsula, Tralee and North Kerry. This action will include:
- To develop a sustainable basis for commercial development centred on creating strong signature, supporting and ancillary experiences that are commoditised through the creation of saleable experiences that excite consumers and buyers alike.
- A prioritised/tiered Product Development pipeline (new attractions, activities, festivals events, trails, food offerings, night time activity, music etc) – with strong emphasis on developing (in a manner appropriate to each area) the hero products that attract and the ancillary products that can increase 'dwell' time.

Timeframe for delivery Q4 2020

How will delivery be measured?
KPIs will be set by Fáilte Ireland for each VEDP and monitored on a quarterly basis

Responsibility: Fáilte Ireland, with key stakeholders engaged: Local Authorities, relevant State Agencies, industry, and Community Tourism Networks

Action 3:

Build capability and resilience in the region's tourism enterprise base.

In 2019 / 2020 Fáilte Ireland will be focusing on the following key tourism business supports which will assist with building business resilience in the South West region:
- Business Operations Excellence
- Sales Skills and Marketing Excellence
- Brexit Response Programme
- New Emerging Markets Readiness
- Fáilte Ireland Accredited Service Excellence

Timeframe for Delivery 2019 / 2020

How will Delivery be Measured?
Net Promotor Score

Responsibility: Fáilte Ireland, with support from REP Committee

Action 4:

Reduce seasonal 'underemployment' in the tourism sector.

Fáilte Ireland will continue to offer programmes to help businesses to develop their experiences and explore the financials of extending the tourism season into the 'shoulder' months.

Timeframe for Delivery 2019 / 2020

How will Delivery be Measured?
Net Promotor Score

Responsibility: Fáilte Ireland, with support from REP Committee

STRATEGIC OBJECTIVE 5

Support growth in the region's marine and maritime sector

CONTEXT

The South-West region has a wealth of natural resources, which contribute to the social and economic fabrics of the region. Maritime and the marine is a growth sector and selling point for the region, reaching into a range of areas including enterprise and entrepreneurship, tourism, technology, and sustainability, among others.

The South-West has natural marine assets and resources that could be further leveraged to grow business and employment, supported by the development of productive connections and networks.

There is potential to create added value to products sourced within the Region (including 'blue-tech'), that result in a more diversified and resilient sector, with associated economic and employment benefits.

Key regional assets in the marine and maritime area include:
- the 'Entrepreneur Ship': the world's first business incubator dedicated to marine and energy companies, based in Lower Cork Harbour and run by the MaREI Centre,
- one of the country's four principal ports for cruise liners, as well as a number of strategically important regional ports,
- concentrations of activity in fishing, seafood processing, boat building, marine retailing, aquaculture; and
- concentrations of activity in marine technology, biotechnology, marine commerce, shipping and transport services.

To drive forward initiatives and realise opportunities for the South West in this sector, the South West REP Steering Committee will form a working group that will progress the actions already identified below as well as focusing on defining priorities and a longer term agenda for the region in relation to strengthening the marine and maritime related enterprise development ecosystem; for example the development of new infrastructures to support marine innovation and marine skills training; assessing the economic potential of existing port infrastructures; and engaging cross regionally in relation to the development of the Shannon Estuary and strategic landbanks as identified in the Shannon Integrated Framework Plan.

VISION TO 2020

The South-West region to be recognised as an exemplar for enterprise and innovation in the marine and maritime sector.

KEY ACTIONS TO 2020

Action 1:

Undertake an audit of the marine and maritime economy, in the South-West.

Undertake an audit of the region's marine and maritime economy, including an assessment of numbers employed and areas of work, in order to create a comprehensive picture of the sector's impact in the region, drawing from national level analyses (incl. BIM).

Timeframe for delivery Q4 2019

How will delivery be measured?
Data mapped and analysis completed

Responsibility: Marine and maritime sector working group (formed through the REP Steering Committee)

Action 2:

Feasibility Study: potential of the marine and maritime economy for job creation in the two pilot areas.

Selecting two pilot coastal areas for audit, conduct a study to assess how best to realise potential for job creation through the assets and opportunities of the marine and maritime economy, to include maritime innovation and maritime/marine skills training.

Timeframe for delivery Q4 2019

How will delivery be measured?
Assessment undertaken

Responsibility: Marine and maritime sector working group (formed through the REP Steering Committee)

Action 3:

Promote networking and collaboration in the South-West's marine and maritime sector.

Develop a network/collaborative forum or event to bring together diverse strands of the sector, to support collaboration, highlight supports and resources, and showcase best practice.

Timeframe for delivery Q4 2019

How will delivery be measured?
Delivery of event
Collaboration agenda developed

Responsibility: Marine and maritime sector working group (formed through the REP Steering Committee)

STRATEGIC OBJECTIVE 6

Ensure the availability of skills and talent to underpin the region's economic growth potential

CONTEXT

Talent is the key business differentiator and asset for the twenty-first century and the global competition for talent is becoming more apparent. The South-West's ability to continue to grow and attract investment will be dependent on readily available talent and highly skilled workers. The *National Skills Strategy 2025* sets out an ambitious plan to ensure the development of a skills supply that is responsive to the changing and diverse needs of our people, society and the economy. The skills supply needs to be appropriately configured so that it can be responsive and adaptable to the needs of enterprise in the South-West region. Considerable work is ongoing to address these needs, in particular through the South-West Regional Skills Forum (RSF). This Strategic Objective is aimed at supporting and adding value to work that is currently ongoing while also seeking to identify and drive new initiatives through increased collaboration.

Sustained access to the right talent and skills is crucial for the region to attract and retain investment. Skills demand has intensified in sectors such as construction, the digital economy, and manufacturing as well as others. It is crucial that anticipated shortages and/or upskilling requirements are identified well in advance so that a response can be developed and mobilised to ensure that businesses in the South-West region can continue to perform and grow.

Another important consideration is the distinctive needs in more peripheral and rural parts of the region. In areas remote from Cork City and the larger centres within Counties Cork and Kerry, residents remain largely dependent on local economic activity and entrepreneurship to generate employment opportunities. It is also the case that some of the region's global indigenous players emerged from more rural settings. It is critical that such potential is nurtured and that existing and emerging enterprises in these areas can access the supports and talent they need.

Skills and Talent is one of the key themes under Future Jobs Ireland, the Government's forthcoming new plan to guide the next phase of Ireland's economic development. By placing this objective at the heart of the Regional Enterprise Plan, the South-West region can be both reactive and proactive in creating sustainable jobs that can deal with new challenges and embrace modern technologies.

Funded by the Department of Education and Skills, the network of nine Regional Skills Fora has been created as part of the Government's National Skills Strategy 2025. The Fora provide an opportunity for employers and the education and training system to work together to meet the emerging skills needs of their regions.

The Fora have been established to align with wider Government policy and initiatives on regional economic development. The innovative structure of the Fora sees the work plan within each region being driven by key stakeholders in the region including employers, enterprises and education and training providers. The work of the Fora through facilitation and engagement will contribute to better outcomes for learners and support enterprise development.

The Fora provide a single point of contact in each region to help employers connect with the range of services and supports available across the education and training system; provide more robust labour market information and analysis of employer needs to inform programme development; greater collaboration and utilisation of resources across the education and training system; and enhancement of progression routes for learners. The Fora also provide a structure for employers to become more involved in promoting employment roles and opportunities for career progression in their sectors.

VISION TO 2020

That business development and growth in the South-West continues to benefit from the availability of appropriate skills and talent, and that appropriate responses are being mobilised to build resilient enterprises and address relatively higher levels of unemployment in certain parts of the region.

KEY ACTIONS TO 2020

Action 1:

As part of the Skills for Growth initiative the Regional Skills Forum will assist local enterprises identify their skills' needs through a variety of audit tools to ensure that the Region has the effective use of skills to support economic and social prosperity.

Once skill needs have been identified, Regional Skills Fora will link companies with the education and training providers best suited to responding to identified skills need.

Timeframe for delivery: Q4 2019

How will delivery be measured:
Number of enterprises audited

Responsibility: RSF, and partners including EI, IDA, ETB, Údarás na Gaeltachta and DEASP

Action 2:

Double the number of participants on the DES EXPLORE programme over the 2018 figure. The EXPLORE programme is designed to address the need for enhanced digital skills among older workers in manufacturing sectors within the region.

Timeframe for delivery: Q4 2019

How will delivery be measured:
No of participants

Responsibility: Education Training Boards, Regional Skills Forum,

Action 3:

Support education and training providers in preparing applications under Springboard+ 2019 in collaboration with local enterprise in order to increase provision of programmes for upskilling and reskilling within the region.

Timeframe for delivery: Q2 2019

How will delivery be measured:
No. of successful applications

Responsibility:
RSF, Higher Education Institutes in the region

Action 4:

Pilot an initiative targeted at rural and urban (CSO) 'Unemployment Blackspots' in the South-West region.

Deliver targeted training to cohort population in identified unemployment blackspots including the opportunity to up-skill where deficits have been identified. Deliver targeted supports and training in areas such as e-commerce to encourage sustainability amongst retailing business, enterprise development and start-ups in identified areas.

Pilot to initially target one location in each Local Authority area, with potential for further expansion.

Timeframe for delivery Q2 2020

How will delivery be measured?
Succcessful delivery of pilot

Responsibility: Education and Training Boards, Local Authorities, LEOs, Údarás na Gaeltachta

Action 5:

Examine opportunities for further regional applications of the Pilot 'Smart Living in West Kerry' Project, with a focus on upskilling and re-training.

In collaboration with ESB Networks, Electric Ireland, the Dingle Creativity & Innovation Hub and Transition Dingle 2030, Kerry ETB is engaging in a project with the aim of creating a blueprint for moving to a low carbon society. This will include upskilling and retraining in the installation and uses of renewable and smart technologies in the Dingle Peninsula area. The South-West committee will review opportunities to apply the results of this pilot to other rural areas in the region.

Timeframe for delivery Q2 2020

How will delivery be measured?
Opportunities for further application identified

Responsibility: Kerry ETB, Regional Skills Forum, Local Authorities, Údarás na Gaeltachta

3 Enterprise Agency and LEO activities in the South-West to 2020

In order to achieve the 2020 employment targets and maintain strong regional enterprise and job creation performance, the Strategic Objectives and collaborative actions identified for the South-West are set alongside and complement the core activities of the Enterprise Agencies, the Local Enterprise Offices (LEOs).

The Enterprise Agencies each have corporate strategies which include national level objectives as well as frameworks for bespoke regional activities that support regional enterprise development potential and leverage regional assets and opportunities.

This section provides an overview of these activities in the South-West to 2020, including their ongoing support for the installed base of companies in the region as well as the range of supports and initiatives that they are undertaking to foster and attract new enterprise development and investment for the region.

The contributions and remit of other relevant agencies and bodies in the South-West are outlined in Appendix 4.

Enterprise Ireland

Enterprise Ireland supports companies in urban and rural areas to start, innovate and remain competitive in international markets, now and into the future. At the centre of the agency's strategy, *Build Scale, Expand Reach 2017 – 2020*, are strategic targets focused on:

- Assisting clients to create 60,000 new jobs by 2020 while sustaining the existing record level of jobs;

- Growing the annual exports of client companies by €5bn to €26bn per annum;

- Increasing the level of spend made by client companies in the Irish economy by €4bn to €27bn per annum by 2020; and

- Inspiring more Irish owned companies to have global ambition.

The 5,000 manufacturing and internationally traded services companies that Enterprise Ireland works with are a critical source of existing employment and job creation in every county in Ireland.

Reflecting the strength of the Irish economy and of global markets in 2018, Enterprise Ireland client companies reported strong employment performance. Enterprise Ireland's 2018 employment survey reported:

- the highest employment in the 20 year history of the agency with 215,207 people employed in Enterprise Ireland supported companies;

- the successful number of net jobs created which saw 9,119 new jobs created after loses are taken into account, with over 60 percent of these outside Dublin;

- the lowest number of job losses since 1998; and

- employment growth across all regions.

Enterprise Ireland is working with client companies through a network of market and sector advisers from ten offices located throughout the country. This network enables the agency to connect and collaborate at a local level with enterprise development partners to assist in driving the multiagency response required to promote regional development. Enterprise Ireland engages with established client companies through teams of sectoral focused development advisors using a company led diagnostic approach which is used to establish clients' business needs. Based on this, the agency can tailor a support package to the company's growth potential based on their ambition, capability and need. A support package focuses, where relevant, on six business pillars (Innovation, Finance, Operations, Sales and Marketing, People and Organisational Development). Enterprise Ireland actively works with established clients throughout the country on an one-on-one basis to deliver this client engagement model.

The EI Corporate Strategy "Build Scale Expand Reach 2017 – 2020" places the regions at the core of economic growth in Ireland. The strategy sets ambitious targets to sustain 200,000 existing jobs and to create 60,000 new jobs nationally by 2020.

Enterprise Ireland's Regional Plan 2019 builds on this Strategy. It is a plan which identifies "National Initiatives" that are impactful and will develop regions of scale. The plan entails a vision that is ambitious and proposes a number of new initiatives which will have significant impact on economic development in the regions. The plan is founded on four core objectives:

- To maximise growth of Enterprise Ireland Clients in the regions

- To strengthen Regional Infrastructure to maximise future growth of Irish Enterprise in the Regions

- To support Entrepreneurship in the Regions

- Work in collaboration to deliver Regional Growth

Enterprise Ireland's overall vision for the region is: "All regions growing optimally, based on their innate and unique strengths and capabilities, sustaining and creating regional jobs and thereby, maximizing the contribution made by each region to economic growth & national prosperity".

Enterprise Ireland in the South-West

- In 2018, 28,629 people were employed across 654 Enterprise Ireland supported companies in the South-West.

- EI supports all sectors with success deriving from sectors such as Business Process Outsourcing, financial services, agri-food, and beverage brewing and distribution.

- Enterprise Ireland has co-funded, with local enterprise development groups, 157 Community Enterprise Centres across the country including 13 in Cork and Kerry. These centres provide space in a supportive environment for budding entrepreneurs and serve to help the development of entrepreneurship locally.

- The Technology Centre Programme is a joint initiative between Enterprise Ireland and IDA Ireland allowing Irish companies and multinationals to work together in these centres. Technology Centres are collaborative entities established and led by industry. These centres are resourced by highly qualified researchers associated with research institutions who are empowered to undertake market focused strategic R&D for the benefit of industry. There are 2 Technology Centres located in the region.

- Enterprise Ireland, in partnership with the Institutes of Technology, has established a nationwide network of 15 Technology Gateways which deliver technology solutions for Irish industry close to their market needs and are open to all sizes of companies. There are two Gateways located in the Cork; TEC and CAPPA. The Kerry Gateways are IMaR Gateway and Shannon ABC Tralee.

- Enterprise Ireland has funded the establishment of a national network of business innovation centres and specialist bio-incubation facilities across the Higher Education Sector. Cork is currently home to 3 campus incubators;

Gateway UCC, Tyndall Incubation Centre and Rubicon Centre, and 1 specialist bio-incubation facility in UCC. The Tom Crean Business Centre operates from IT Tralee.

- EI supports and collaborates with HEIs in the region including IT Tralee, UCC, Cork IT and Tyndall National Institute through Innovation supports such as the Commercialisation Fund, Innovation Partnerships and Innovation Vouchers.

Local Enterprise Offices

The Local Enterprise Offices (LEOs) in every county are the 'first-stop-shop' for providing advice and guidance, financial assistance and other supports to those wishing to start or grow their own businesses. In the first instance, the LEOs provide a 'signposting' service in relation to all relevant State supports. The LEOs can also offer advice and guidance in areas such as Local Authority rates, Public Procurement and other regulations affecting business.

The LEOs can offer grant aid to microenterprises in manufacturing and internationally traded services sectors which have the potential to develop into strong export entities, in addition to 'soft' supports in the form of training, a mentor to work with the business proposer, or targeted programmes such as Lean for Micro (to help boost business productivity and competitiveness).

In line with the Regional emphasis of the LEOs, the results from the Annual Employment Survey 2017 show that 7,135 gross jobs were created of which 5,775 were outside Dublin or 81 percent. A total of 3,760 net jobs were created of which 3,051 were outside Dublin or 81.2 percent.

The South-West is served by its Local Enterprise Offices in Cork and Kerry which are co-located with the Local Authorities. In 2017, the LEOs operating the South-West region supported an additional 397 jobs from 2016 (total of 5,391 jobs) and the establishment of 58 new companies, bringing the total number of companies supported by the LEOs in the South-West region to 1,045.

IDA Ireland

IDA Ireland is the State's inward investment promotion agency. The mission of the agency is to partner with multi-national companies to win and develop foreign direct investment, providing jobs for the economic and social benefit of Ireland.

IDA's current strategy, *Winning: Foreign Direct Investment 2015-2019*, sets out ambitious targets to support the delivery of its mission to win and develop Foreign Direct Investment in Ireland. These include:

- Win 900 new investments for Ireland

- Support clients in creating 80,000 new jobs

- Grow market share and help maximise the impact of FDI investments

- Focus on greater balanced regional development

Regional development is a key pillar of IDA's strategy. For the first time, ambitious investment targets have been set for each region. IDA is targeting a minimum 30% to 40% increase in the number of investments for each region outside Dublin. These investments are a combination of new name investments, expansions from existing overseas companies in Ireland and R&D investments. To deliver on these ambitious targets IDA Ireland has;

- Worked with public bodies and the private sector on the Regional Enterprise Plans

- Worked with existing clients to retain and strengthen their presence in each region

- Increased Global Business Services and High-Tech Manufacturing investments

- Aligned IDA business sectors with regional strengths to develop sectoral ecosystems

- Work more closely with EI and its client companies to identify synergies, enhance clusters, participate in site visits and maximise benefits for the region through the Global Sourcing Program

- Delivered property solutions in designated regional locations

- Increased IDA Ireland's regional footprint to adequately support the regional strategy

2019 represents the final year of IDA's current Strategy "Winning 2015-2019". In implementing the strategy, IDA Ireland has shown a clear determination to showcase the many benefits that are to be found for companies locating in regions. Significant gains have been made in deepening and growing FDI outside Ireland's main cities. To date, 407 regional investments have been won and 27,000 net jobs have been added on the ground in regional locations. A total of 58 percent of all IDA client supported jobs are now located in the regions with every region of the country experiencing employment gains in 2018. In addition to direct employment and skills transfer, IDA Ireland's client companies have a hugely positive effect on the local economy with over eight jobs being created for every 10 jobs in an FDI company. A total of 50 percent of the €5.7bn in annual capital expenditure by IDA client companies occurs outside of Dublin. These investments have been won despite the demographic challenges that exist and international trends of greater urbanisation.

IDA Ireland is committed to playing its part in the economic development of Irelands regions. However, winning investments is a challenge and will require a continued collaborative effort by all national and regional stakeholders.

Regional locations must continuously demonstrate the capability to deliver on a number of exacting criteria which generally inform the location decisions of multinationals.

An assessment of investments delivered for regions since 2015, would confirm the strategic importance of key criteria in actually influencing the investment decision;

- Critical mass in population

- The ability to attract and develop appropriate skills

- The presence of Third Level Institutes

- The existence of clusters of companies in specific industry sector

- Regional Infrastructure

- Regional Place Making Strategies

- Availability of high spec standard Manufacturing & Commercial Office Properties

To support the delivery of IDA's current strategy and the attraction of investments into different parts of the country, a €150m property investment plan was announced in 2015. IDA Ireland's approach of developing strategic sites and developing advanced buildings has proven to be hugely successful. In 2019, IDA Ireland will continue its building programme with the design and construction underway of advance buildings in Sligo, Dundalk, Athlone, Waterford, Galway, Monaghan and Limerick.

Over the course of 2019, IDA Ireland will be developing the agency's new five-year strategy. This strategy will take account of the changing nature of work and the impact of technology on specific sectors. Profound changes are occurring in the world of work and this is already reflected in the jobs being created by the IDA Ireland client base. We can see an increasing complexity in the roles being created, technology skills becoming ubiquitous across roles, increasing demand for business professionals and a fall in the number of low-skilled jobs including back office support and basic manufacturing. This transition is likely to impact the nature and type of roles across the Regions of Ireland.

Building on the success achieved to date, IDA will continue to collaborate with all stakeholders and parties in the Regions to realise the economic potential and ambition of Irelands regions under the Regional Enterprise Plan.

IDA in the South-West

The South West consists of 2 counties, Cork and Kerry. There are 186 multinational companies based in the region, employing a total of 41,108 in 2018. There are 169 IDA client companies in Cork city & county employing 38,867, while Kerry has 17 IDA client companies employing 2,241 persons.

IDA Ireland engages with the base of overseas companies across the South West region on a continual basis to support, sustain and help grow client operations. Many of these companies have

been key employers in their respective locations over many decades.

The South-West region has seen nine consecutive years of positive net job creation across IDA client companies. This growth in employment has been spread across Cork City, County Cork and County Kerry and the region has contributed significantly to the total growth of FDI related jobs nationally. Over the past three years (since 2015), employment in IDA client companies across the South West region has increased by over 6,100.

IDA Ireland continues to build on the established and emerging clusters across the region. These include a strong Life Sciences sector comprising Pharmaceuticals, Biologics Manufacturing, Medical Technologies supported by global business services, process engineering consultancies and a range of specialist service providers serving the industry. A number of significant investments have been announced across the region over the past three years including Agilent Technologies and Pepsico in Little Island Cork; Central Pharma in Tralee, Janssen Sciences and Biomarin in Ringaskiddy, MSD in Brinny, Eli Lilly in Kinsale and Merck Millipore and Stryker in Carrigtwohill.

The presence of over 60 technologies companies in hardware and software services supported by industry focused third level institutions and international renowned research centres has helped to attract even more technology companies to the region. Park Place Technologies, Datastax, Forcepoint, Rubrik, Keeper Security, NGINX, Cylance and Hortonworks all established operations in the region for the first time over the past three years.

The region is already home to the largest number of International Financial Services companies outside Dublin and a strong Fintech sector in Kerry, supported by one of the largest undergraduate business schools in the country. A number of companies announced investments in the region including Deutsche Borse/Clearstram, Alter Domus, Willis Towers Watson, Apex Funds Services and World Nomads Group. These investments endorse the region and Cork in particular as a credible location for financial services.

The South West region is home to University College Cork (UCC), Cork Institute of Technology (CIT) and IT Tralee (ITT) with over 35,000 students. The presence of Tyndall Institute coupled with a number of SFI Research centres either led by or partnered with UCC and Technology Centres in IT Tralee and Cork Institute of Technology offers a strong proposition for the region to play an increasing role in partnering with IDA client companies on R&D and innovation partnerships.

The availability of property solutions continue to be a strategic asset supporting the winning of FDI. Across the region IDA Ireland has a portfolio of strategic landbanks and Business & Technology Parks available to support IDA and EI client companies.

To support the delivery of IDA's current strategy Winning FDI 2015-2019, a €150m property investment plan was announced in February 2015. This investment was to focus on the building of Advance Building Solutions (ABS), infrastructure investment in a number of Utility Intensive Strategic site solutions and the upgrade of Business and Technology Parks within IDA's national portfolio. IDA's property investment programme for the South-West region included the construction of an Advance Building Solution (ABS) in Tralee, Co Kerry which has facilitated Central Pharma in announcing a Pharmaceutical Packaging manufacturing facility and the creation of 100 jobs in December 2018.

IDA also works closely with the private sector to encourage and market appropriate and cost-effective building and property solutions suitable for FDI clients. The development of a number of high quality office developments in Cork over recent years has been instrumental in winning new FDI to the region.

IDA's focus over the coming two years and beyond is to build on the strengths and competencies of the region with a particular focus on high value manufacturing, services and research and development opportunities across a number of established clusters in Life Sciences, Technology, and Global Business services including Financial Services as well as Engineering. Emerging technology trends have and will continue to create

new opportunities across the region in areas such as cybersecurity, data analytics, artificial intelligence, smart manufacturing, and new approaches to working such as home working and hub working. IDA will continue to work closely with Enterprise Ireland and its indigenous base of companies to identify synergies, enhance clusters, participate in site visits and maximise benefits for the region.

Enhanced collaboration will be needed to align the efforts of all stakeholders and service providers to ensure that the South West region continues to meet the needs of overseas companies. The delivery the necessary infrastructure, accommodation and property solutions, fostering the continued development and growth of a skilled workforce in a high quality of life environment are pre-requisites to winning continued FDI investment. Such collaboration can act as a catalyst to attracting new companies and talent to the region. IDA Ireland will work proactively to increase collaboration with its clients, stakeholders and the private sector to support the implementation of South West Regional Enterprise Plan.

4 Implementation of the Regional Enterprise Plan

The consultation process to refresh and refocus the original Regional Action Plans was enhanced by an understanding amongst stakeholders of the importance of ownership, collaboration, and the definition and delivery of specific measurable actions in the new Plans that could add value to the existing activities being undertaken by the Enterprise Agencies, LEOs and other relevant bodies involved in supporting enterprise development. These priorities are reflected in the implementation structure for the new Regional Enterprise Plans.

The existing Regional Implementation Committee construct will be maintained for each region but will be renamed as a 'Regional Steering Committee'. Each Committee will continue to be chaired by a senior figure from the private sector who has been appointed by the Minister for Business, Enterprise and Innovation. The functions of the Steering Committee are as follows:

- Oversee and drive delivery of the REP.

- Agree an annual work programme for the Committee based on the Plan.

- Nominate and secure 'Champions' to support delivery of the Strategic Objectives.

- Agree key milestones and metrics for delivery of each actions.

- Oversee the formation of working groups as necessary to drive implementation of actions.

- Explore and propagate new ideas and opportunities for collaborative projects, and funding.

- Provide a forum for the sharing of updates and information by members on key enterprise development initiatives including those set out by the Agencies and LEOs in this Plan and other pertinent updates (incl. REDF, RSES, Project Ireland 2040 etc.).

- Oversee, contribute to and sign off (through the Chair) on annual Progress Reports to DBEI.

Full details of the composition of the Steering Committee is contained in Appendix 1.

The Chairperson will convene at least three meetings of the Steering Committee per year and will present a progress update on their Plan to the Minister at an annual meeting of all Chairpersons in the second half of 2019. This meeting will provide a fora for the Chairs to share good practice and identify potential areas for inter-regional co-operation. The Chairperson will also lead the Committee in the preparation of two progress reports to be submitted to the Department at the end of 2019 (mid-term) and end of 2020 (final report).

It is intended that each Steering Committee will oversee the formation of smaller working groups to drive delivery of actions or groups of actions in the REP. Working Groups will convene as frequently as is required and will report on progress to the Chairperson and the Steering Committee on a regular basis. They will also provide input to the annual progress reports in relation to their action(s).

Each region has the resource of a Programme Manager/Secretariat which has been provided through the Local Authorities. The Programme Manager/Secretariat will support the Chairperson and the Steering Committee in the coordination and delivery of the Plan and will be the primary operational point of contact with DBEI.

The Final Progress Reports for the Regional Action Plans for Jobs 2015-2017/8 provide a closing status in relation to all actions in these original reports and can be found on the Department's website at www.dbei.ie. The original Plans continue to be a useful resource for the REPs going forward as an input to the rolling work agenda for the initiative.

Finally, DBEI will be responsible for the oversight and coordination of all REPs at a national level. The Department will provide ongoing advice, guidance and support to the Chairpersons, Programme Managers/Secretariat and Steering Committees.

Targets for the South-West region to 2020

The Regional Action Plan for Jobs 2015-2017 set out two core outcomes for achievement in each region by the end of 2020:

- employment growth of between 10 and 15 percent; and

- an unemployment rate reduced to within one percentage point of the State average.

Utilising new data from the CSO Labour Force Survey (LFS)[3], the rate of growth and unemployment rates achieved for the South-West Region during the 2015-2017 lifetime of the original Regional Action Plans and up to Q3 2018 are outlined in Table 1 overleaf.

The South-West has performed relatively strongly on employment growth in the period to Q1 2018 and if the same momentum continues, will likely achieve the 2020 target over the coming years. Unemployment in the region was slightly above the State average at the start of 2018, and since then, the South-West unemployment rate has seen further improvement, reducing to 4.9 percent, the lowest of all the regions in Q3 2018. For a more detailed statistical analysis of the region's performance, please see Appendix 2.

The focus for the South-West over the period to 2020 is to sustain the momentum of employment growth achieved since 2015 and to maintain the low unemployment levels already achieved. The strategic objectives and actions in this Plan, along with the core activities of the various Agencies and Bodies involved in supporting enterprise development over the coming two-year period will support this.

An important consideration for the South-West is to consider differential rates of employment growth performance across the region, paying attention to live register data at the local level and placing a focus on more challenged peripheral areas and so-called 'unemployment blackspots' in the region. In addition, with some of the lowest labour force participation rates nationally, there needs to be a focus on removing barriers for people to access work opportunities.

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3   In 2018, the CSO introduced a new quarterly Labour Force Survey (LFS) to replace the original Quarterly National Household Survey (QNHS), which incorporated a new survey methodology and applied new NUTS 3 regional administrative boundaries used by Eurostat. The CSO later produced comparable ('back-casted') data at regional level to overcome the resulting break in the time series between old QNHS data and the introduction of the new LFS.

Table 1

	Numbers Employed				Unemployment Rate	
	Q1 2015	Q3 2018	Change Q1 2015 to Q3 2018	Growth Q1 2015 to Q3 2018	Q1 2015	Q3 2018
South-West	295,000	333,900	38,900	13.2%	10.5%	4.9%
State	2,014,400	2,273,200	258,800	12.8%	10.5%	6.0%

Source: CSO Labour Force Survey, Q3 2018

Appendix 1:
Membership of the Regional Steering Committee

Organisations represented on the South-West Steering Committee[4]

Chair of the South-West Committee

Dr. Adrienne Harrington,
CEO, Ludgate Hub

Membership of the Committee:

Enterprise Champions	Fáilte Ireland
Cork County Council	InterTrade Ireland
Cork City Council	Ibec
Kerry County Council	Bord Bia
Kerry Local Enterprise Office	Teagasc
Cork North & West Local Enterprise Office	Bord Iascaigh Mhara
South Cork Local Enterprise Office	University College Cork
Cork City Local Enterprise Office	Cork Institute of Technology
Enterprise Ireland	Institute of Technology Tralee
IDA Ireland	Cork Chamber of Commerce
Southern Regional Assembly	Dingle Chamber of Commerce
Regional Skills Forum: South-West Region	Department of Business, Enterprise & Innovation
Cork Education & Training Board	Department of Employment Affairs and Social Protection
Kerry Education & Training Board	
Údarás na Gaeltachta	Department of Rural and Community Development

4   The existing Implementation Committees will be renamed 'Steering Committees'

Appendix 2:
Brief profile and statistical snapshot – South-West

Constituent counties	Cork and Kerry		
Regional Population & change (1996-2016)	546,640 (1996): 690,575 (2016) increase of 143,935		
Total in employment	333,900*		
Labour Force Participation rate	62.9%*		
Unemployment rate	4.9%*		
Unemployment blackspots[5]	6[6]		
Percentage employed in Manufacturing: Services: Public sector	14%: 23%: 24%		
Educated to third level in South-West: State	46%: 45%		
Third Level Students (full-time & part-time)	33,4082[7]		
Number of enterprises[8] (micro: small: medium: large) (2016)	32,981: 2,364: 392: 58		
Number of Enterprise Ireland High Potential Start-Ups[9] (HPSUs) South-West: State (2017)	7: 90		
EI supported employment & no. client Companies 2016 - 2017	2016		2017
	Jobs: 29,613		Jobs: 30,841
	Companies: 694		Companies: 695
IDA supported employment & no. client companies (2017)	2016		2017
	Jobs: 36,059		Jobs: 37,434
	Companies: 167		Companies: 172
LEO supported employment & no. client companies (2017)	2016		2017
	Jobs: 4,965		Jobs: 5,391
	Companies: 987		Companies: 1,045
Number of LEO Priming Grants[10] South-West: State (2017)	54: 294		

5   Unemployment Blackspots are defined as Electoral Districts with at least 200 people in the labour force and an unemployment rate of 27% or higher

6   Unemployment blackspots in the Region: Cork City (1) & – Tralee

7   National University of Ireland, Cork (19,800). Cork Institute of Technology (10,770) & Institute of Technology, Tralee (2,838)

8   A Small Enterprise is defined as: an enterprise that has fewer than 50 employees and has either an annual turnover and/or an annual Balance Sheet total not exceeding €10m: A Medium Sized Enterprise is defined as: an enterprise that has between 50 employees and 249 employees and has either an annual turnover not exceeding €50m or an annual Balance Sheet total not exceeding €43m: A large Enterprise is defined as: an enterprise that employs greater than 250 employees, has either an annual turnover of greater than €50m or an annual balance sheet of greater than €43m

9   HPSUs are start-up businesses with the potential to develop an innovative product or service for sale on international markets and the potential to create 10 jobs and €1m in sales within 3 years of starting up.

10   A Priming Grant is a business start-up grant, available to micro enterprises within the first 18 months of start-up.

* CSO Labour Force Survey Q3 2018, South-West Region

The South-West region has a diversified enterprise mix that is increasingly technology intensive and with acknowledged strengths, skills and capabilities in high-tech, manufacturing and ICT-enabled global business services.

The region hosts a range of indigenous and foreign firms operating in international markets including in areas such as pharmaceuticals and medical devices, precision engineering, ICT, and services and solutions. The region also home to world renowned heritage, cultural and tourism assets and resources and strong brands of Kerry and Cork as destinations in international markets.

The region has emerging strengths and potential in areas such as energy, healthcare and smart infrastructure and has a culture and tradition of entrepreneurship and startups across the spectrum of sectors from internet technologies to artisan food and design and crafts.

With top-tier research and technology institutions, the region has a unique mix of education and research assets. University College Cork, Tralee and Cork Institutes of Technology and Teagasc at Moorepark, are all involved in world class research and innovation.

Critically, the region has a solid population base of over 690,000 in 2016, which has increased by four percent since 2011, with a strong City Region and twelve large urban centres that play important roles as pull factors for the region as a whole. The region has strong international physical connectivity, with air services from Cork and Kerry airports, together with nine sea ports.

Employment trends

In Q3 2018 there were 333,900 people employed in the South-West region. Over the period Q1 2015 to Q3 2018, employment overall has grown by 13 percent with 38,900 more people employed. The structure of the sectoral employment has changed little over that period, with some adjustments evident. Chart 1. shows the employment figures from Q1 2012 to Q3 2018.

Chart 1. South-West employment growth (CSO)
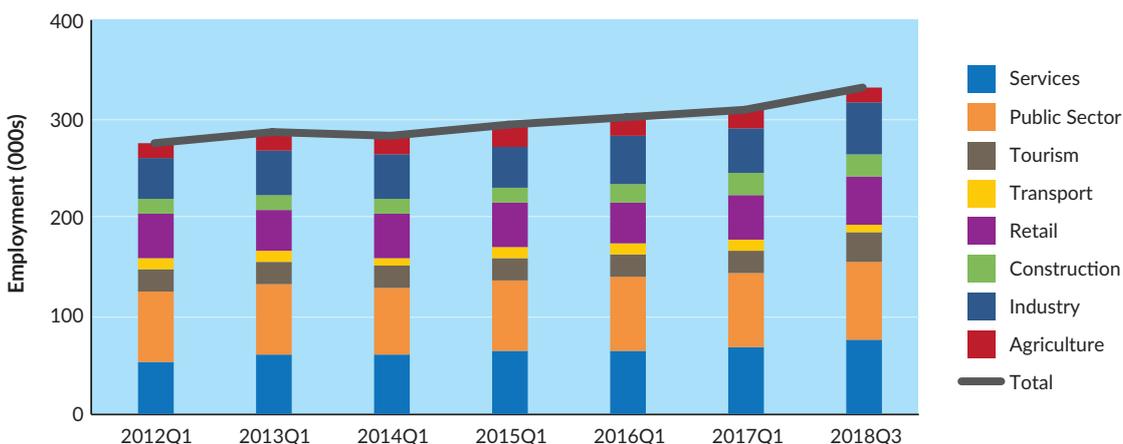
Services

Employment in the Services sector, including the Public Sector, has increased significantly from 203,900 in 2012 to 244,100 in Q3 2018 and the sector currently accounts for 73 percent of all employment in the South-West. This highlights the contribution to employment in the South-West. There are currently 244,100 people working in the Services Sector and within the broad Services sector, the combined areas of Public Administration/Defence, Human Health/Social Work and the Education sector account for 77,600 of those employed in the South-West which represents 31 percent of all Services employment and 23 percent of the total employment in the region, which is similar to other regions.

Retail/Wholesale

Retail and Wholesale which forms a significant part of the Services sector and is the largest private sector employer in the country, with particular significance for regional towns and villages. Employment in the sector in Ireland is regionally dispersed with approximately 70 percent employed outside Dublin, 49,400 people are employed in the sector in the South-West region.

Industry/Manufacturing

Employment in the Industry/Manufacturing sector has also increased over the period Q1 2012 to Q3 2018 with 8,400 more employed in the Sector. Employment in this sector counts for 15 percent of employment in the region which is above the national figure of 12.5 percent.

Construction

The Construction sector employed 14,200 in Q1 2012 and this numbers has risen to 21,800 in Q3 2018, accounting for 8 percent of the total employment which is similar to the national trend.

Agriculture

The Agricultural sector employed 15,700 in Q1 2012 and this grew slightly to 16,100 in Q3 2018 and accounts for approximately 6.5 percent of employment in the South-West, which matches the national average figure.

Tourism

CSO figures indicate that the Tourism sector employed 28,400 in Q3 2018. However, these figures can be considered as conservative as they only cover employment in accommodation and food services. The actual figure maybe somewhat higher if other "Services" employment, for example in visitor attractions is included.

Appendix 3:
Regional Enterprise Development Fund (REDF)

The €60 million Regional Enterprise Development Fund (REDF) was launched in May 2017 with the overarching aim of driving enterprise development and job creation in each region throughout Ireland. Administered by Enterprise Ireland, it supports new collaborative and innovative initiatives that can make a significant impact on enterprise development in the region/across regions, or nationally.

Over the first and second calls under the REDF, the South-West region secured funding of over €10 million across ten projects:

Call	Project	Description
1	Agritech Centre of Excellence	Global Agri-Tech Centre
1	Cork Urban Enterprises	Building and facilities for new enterprises
1	IT@Cork CLG	A cluster manager to foster collaboration
1	Kerry SciTech CLG	Cluster for science and tech
1	MOL TEIC CLG	Community Enterprise Job Creation Initiative
1	RDI Hub CLG	Digital Innovation Hub and Living Lab ecosystem
1	Sneem Innovation & Tech Services	Digital Hub
2	CIT Consortium Projects DAC	Build start-ups from undergraduates
2	Ludgate Operations CLG	Innovation Centre and a series of supports
2	Vista Agri 4.0 Hub CLG	Agri-Innovation Hub

The South-West Regional Steering Committee will work closely together with other stakeholders to leverage the opportunities that these projects will generate in the coming years. The Steering Committee can also assist in identifying projects that have the potential for funding in the future.

Appendix 4:
Other State Agencies and Bodies supporting enterprise development

Local Authorities

The Local Government Reform Act 2014 provided for the strengthening of the role of Local Authorities towards economic, social and community development. Local Authorities therefore have a strong role in promoting economic development and sustaining and creating a positive environment for job creation. There is good rationale for increased local government involvement in economic development because of the economic impact of its functions generally, its links with enterprise, its local knowledge and leadership, the economic initiatives by many Local Authorities, and its local development and enterprise functions.

Operation of micro-enterprise support services through the Local Enterprise Offices (LEOs) and Local Authority Business Support Units are now key elements of the local government role in economic development. Other economic development functions include:

- contribution to Regional Spatial and Economic Strategies,

- a strong direct role for Local Authorities in promoting economic development, more clearly specified in legislation;

- ensuring that all Local Authorities focus their general functions and services proactively towards supporting enterprise and economic development;

- leading and mobilising economic development locally in conjunction with relevant agencies;

- drawing up local economic development plans in conjunction with the overall City/County Development Plan.

The economic development role is supported by a dedicated Strategic Policy Committee (SPC) in each local authority service.

Bord Bia

Bord Bia, the Irish Food Board, is responsible for the development of new markets and the promotion of Irish food, drink and horticulture, reporting to the Department of Food, Agriculture, and the Marine. The agency's mandate covers trade development, promotion, quality programmes, information provision and marketing support especially for export markets. Bord Bia operates in thirteen overseas locations. Its Origin Green programme is the only sustainability programme in the world that operates on a national scale, uniting government, the private sector and food producers.

Bord Iascaigh Mhara (BIM)

BIM is the state agency with responsibility for developing the Irish sea-fishing and aquaculture industries. BIM's mission is to lead the sustainable development of a competitive, market-led, innovative and quality-driven Irish seafood industry, maximising the returns to industry stakeholders and the socio-economic contribution to communities in coastal regions in particular. BIM is focused on expanding the volume, quality and value of output from the Irish seafood industry. It provides a range of advisory, financial, technical and training services to all sectors of the Irish seafood industry. BIM's Strategy 2013-2017 is an action plan that aims to deliver 1,200 jobs and €1 billion seafood sales by building scale and enhancing competitiveness in the Irish seafood sector.

Fáilte Ireland

Fáilte Ireland is the National Tourism Development Authority. Their role is to support the tourism industry and work to sustain Ireland as a high-quality and competitive tourism destination. Fáilte Ireland provide a range of practical business supports to help tourism businesses better manage and market their products and services.

Fáilte Ireland also work with other state agencies and representative bodies, at local and national levels, to implement and champion positive and practical strategies that will benefit Irish tourism and the Irish economy.

Fáilte Ireland promote Ireland as a holiday destination through domestic marketing campaigns and manage a network of nationwide tourist information centres that provide help and advice for visitors to Ireland.

InterTradeIreland

InterTradeIreland's mission is to support businesses, through innovation and trade initiatives, to take advantage of North/South co-operative opportunities to improve capability and drive competitiveness, jobs and growth. InterTradeIreland helps small businesses through a strong mix of funding support, business intelligence and meaningful contacts. It supports companies not only with funding, but also with specialist expertise and introductions.

Regional Skills Fora

Funded by the Department of Education and Skills, the network of 9 Regional Skills Fora has been created as part of the Government's National Skills Strategy 2025. The Fora provides an opportunity for employers and the education and training system to work together to meet the emerging skills needs of their regions. The Fora have been established to align with wider Government policy and initiatives on regional economic development. The innovative structure of the Fora sees the work plan within each region being driven by key stakeholders in the region including employers, enterprises and education and training providers. The work of the Fora through facilitation and engagement will contribute to better outcomes for learners and support enterprise development.

The Fora provide a single point of contact in each region to help employers connect with the range of services and supports available across the education and training system; provide more robust labour market information and analysis of employer needs to inform programme development; greater collaboration and utilisation of resources across the education and training system; and enhancement of progression routes for learners. The Fora also provide a structure for employers to become more involved in promoting employment roles and opportunities for career progression in their sectors.

Skillnet Ireland

Skillnet Ireland was established in 1999 and is funded from the National Training Fund through the Department of Education and Skills. The primary objective of Skillnet Ireland is to increase participation in enterprise training by companies. Skillnet Ireland fosters an enterprise led approach to workforce development. The process of determining training needs and coordinating the delivery of training, is primarily owned by the enterprise groups engaged with Skillnet Ireland. Skillnet Ireland operates under a joint investment model, part-funded by matching contributions from participating businesses in our learning networks. Encouraging enterprise to lead the process in this way helps ensure that programmes delivered through Skillnet Ireland are highly relevant to the needs of industry. This approach also enables cohesive enterprise networking and the flexibility to respond to ever-changing skills demands through both formal and informal learning. Through 65 plus Skillnet Learning Networks, Skillnet Ireland allocates funding to groups of companies in the same industry sector (or region) and with similar training needs, so

they can deliver subsidised training for their teams. Skillnet Ireland also plays a key role in supporting and enabling Skillnet funded groups to reach their full potential.

Science Foundation Ireland (SFI)

Science Foundation Ireland is the national foundation for investment in scientific and engineering research, operating under the auspices of DBEI. SFI invests in academic researchers and research teams who are most likely to generate new knowledge, leading edge technologies and competitive enterprises in the fields of science, technology, engineering and maths. SFI has supported the establishment of 17 National Research Centres, aligned with the research priority areas set out in Ireland's research prioritisation exercise (which is currently being refreshed). SFI plays a key role in developing international relationships in the research and innovation domain. It is instrumental in raising Ireland's profile and visibility as a location of research excellence in international markets, thus strengthening Ireland's attractiveness for overseas investment.

Sustainable Energy Authority of Ireland (SEAI)

The purpose of the Sustainable Energy Authority of Ireland (SEAI) is to play a leading role in transforming Ireland into a society based on sustainable energy structures, technologies and practices. SEAI provides a range of programmes and services to homes, businesses, schools and communities. It is a key actor in providing research and advice to Government on sustainable energy policy, including renewables and energy efficiency.

Údarás na Gaeltachta

Údarás na Gaeltachta was established in 1980 as the regional authority responsible for the economic, social and cultural development of the Gaeltacht. The overall objective of Údarás na Gaeltachta is to ensure that Irish remains the main communal language of the Gaeltacht and is passed on to future generations. Údarás supports businesses in developing new markets, technologies, products and strategic alliances through research and development.

Waterways Ireland

Waterways Ireland is one of six North-South Implementation Bodies established under the British-Irish Agreement in 1999. It has responsibility for the management, maintenance, development, promotion and restoration of inland navigable waterways, principally for recreational purposes. The waterways under the remit of the Body are the Shannon-Erne Waterway, the Shannon, the Erne Navigation, the Barrow Navigation, the Grand Canal, the Lower Bann, and the Royal Canal.

Western Development Commission

The Western Development Commission (WDC) was established under statute in 1998 to help tackle population decline in the West of Ireland. Its remit covers seven counties: Roscommon, Mayo, Galway, Donegal, Sligo, Leitrim, and Clare. The WDC works to ensure that economic and social policy and practice meet the development needs of the Western Region effectively. Activities include conducting research on regional and rural issues, promoting specific initiatives including sectoral opportunities, and managing and administering the WDC Investment Fund (WIF). This dedicated fund provides risk capital on a commercial basis to projects and businesses through equity and loans.

Department of Rural and Community Development

The Department of Rural and Community Development also has a role to play in contributing directly to the Regional Action Plans through initiatives such as the Rural Regeneration and Development Fund, the Town and Village Renewal scheme and the Atlantic Economic Corridor initiative. The Department's social inclusion programmes - most notably the Social Inclusion Community Activation Programme (SIACP) - also contribute to supporting disadvantaged urban and rural communities.

Third Level Institutes

- University College Cork
- Cork Institute of Technology
- Institute of Technology, Tralee

Appendix 5:
Project Ireland 2040

The National Planning Framework (NPF) and the National Development Plan under *Project Ireland 2040* have been developed in conjunction to link spatial planning policy and infrastructure capital investment to support the potential in all regions. The NPF, as part of Project Ireland 2040, aims to guide the future development of Ireland to 2040 and to influence the spatial patterns of a projected 1 million increase in our population.

The NPF is a long-term framework that sets out how Ireland can move away from the current 'business as usual' pattern of development. The purpose of the NPF is to enable all parts of Ireland, whether rural or urban, to successfully accommodate growth and change, by facilitating a shift toward Ireland's regions and cities other than Dublin, while also recognising Dublin's ongoing key role.

The NPF also sets out a number of key national objectives which include enhanced regional accessibility, strengthened rural economies and communities, and enhanced amenities and heritage. The Ireland 2040 plan sets out a strategy to enable people to live closer to where they work, moving away from the current unsustainable trends of increased commuting; reverse rural decline and promote environmentally sustainable growth patterns and plan for and implement a better distribution of regional growth, in terms of jobs and prosperity.

The Government is focused on unlocking the potential in each region by a co-ordinated delivery of infrastructure and at the same time, enabling regional enterprise development that will enable better distribution of the future anticipated population growth across the whole country while also tackling congestion and quality of life issues.

Project Ireland 2040 Funds

In 2018 the Government launched Project Ireland 2040 and committed €4 billion in funding under the Rural regeneration and Development Fund, Urban Regeneration and Development Fund, Disruptive Technologies Innovation Fund and the Climate Action Fund. The four funds are a major innovation in Project Ireland 2040 and rather than allocating funding in a 'business as usual' way to Government Departments, money is allocated competitively to the best projects, which leverage investment from other sources thereby ensuring that the impact of this investment goes further.

Rural Regeneration and Development Fund (RRDF)

As part of Project Ireland 2040, the Government has committed to providing an additional €1 billion for a new Rural Regeneration and Development Fund (RRDF) over the period 2019 to 2027. Initial funding of €315 million is being allocated to the Fund on a phased basis over the period 2019 to 2022. The Fund will provide investment to support rural renewal for suitable projects in towns and villages with a population of less than 10,000, and outlying areas. It will be administered by the Department of Rural and Community Development.

The new Fund provides an unprecedented opportunity to support the revitalisation of rural Ireland, to make a significant and sustainable impact on rural communities, and to address de-population in small rural towns, villages and rural areas. It will be a key instrument to support the objectives of the National Planning Framework, and in particular to achieve Strengthened Rural Economies and Communities – one of the National Strategic Outcomes of the NPF.

Urban Regeneration and Development Fund (URDF)

The €2 billion Urban Regeneration and Development Fund (URDF) is intended to drive regeneration and rejuvenation of strategic and under-utilised areas within Ireland's five cities, key regional drivers and other large towns. The Department of Housing, Planning and Local Government (DHPLG) has responsibility for implementing the fund, which has €100m available for expenditure in 2019 and an overall allocation of €550 million allocated to the fund up to the end of 2022. The fund will operate on a competitive, bid-based Exchequer grant basis, with proposals being required to demonstrate that they will be:

- Innovative and transformational urban regeneration projects;

- Public-sector led and with the option of community and/or private sector partners;

- Matched by at least 25 percent direct funding from other public and/or private sources;

- A minimum bid of €2m;

- A catalyst for development that would not otherwise occur; and

- Likely to leverage significant further public and private sector investment.

Disruptive Technologies Innovation Fund

The Department of Business, Enterprise and Innovation launched funding under the Government's new Disruptive Technologies Innovation Fund. €500 million is available for co-funded projects involving enterprises and research partners over the period to 2027.

Disruptive technology is that which has the potential to significantly alter markets and their functioning and significantly alter the way that businesses operate. While it involves a new product or process, it can also involve the emergence of a new business model. Disruption is about the combination of technology and business model innovation.

Proposals are expected to address the development, deployment and commercialisation of one or more disruptive technologies to deliver new solutions through investment in the development and implementation of new products and services. Ultimately, the projects funded will create the jobs of the future.

Climate Action Fund

The National Development Plan 2018-2027 sets out the creation of a Climate Action Fund to support climate action projects which will leverage investment by public and private bodies. The Fund will have an allocation of at least €500m over the period to 2027.

On 29 May 2018, the Government agreed to establish the Climate Action Fund. This includes the objective of funding initiatives that contribute to the achievement of Ireland's climate and energy targets in a cost-effective manner. It also offers the potential for innovative interventions which, in the absence of support from the Fund, would not otherwise be developed.

Regional Spatial & Economic Strategies

The RSES for the Southern Region will set a 12-year strategic development framework for the region for the period 2019 to 2031. At its core the RSES sets out economic and spatial planning objectives for the region through implementation of the National Planning Framework and government policy at regional level.

Whilst meeting statutory objectives, the Draft RSES is an ambitious Strategy for building the Southern Region as one of Europe's most Creative, Innovative, Greenest and Liveable Regions focuses on Key Enablers to Transform the Region:

- Connecting our Region – enhanced infrastructure from North to South and East Coast to West Coast, connecting to the Atlantic Economic Corridor.

- Delivering ambitious growth targets for our Cities, creating the Greenest and most Liveable Metropolitan Areas for diverse communities, culture and enterprise - developing the Cork Docklands, transforming and regeneration of Limerick-Shannon including the Northern Distributor Road/ Smart Travel Corridor and achieving a balanced 'Concentric City' model north of the river with development of the North Quays in Waterford.

- Creating an inclusive and Learning Region, establishing the new Technological Universities of MTU and TUSE and developing a Smart Region, enhancing public services and community infrastructure.

- Establishing the Southern Region as Ireland's International Gateway at Cork and Shannon Airports and our Sea Ports.

- Making the most of Cork and Waterford Harbours and the Shannon Estuary – our natural maritime assets.

- Harnessing our Environment and Heritage – along the Wild Atlantic Way, into Ireland's Hidden Heartlands, through Ireland's Ancient East, in the Gaeltacht and islands, along the Blueways and Greenways.

- Revitalising Rural Areas through re-purposing our small towns and villages and increased collaboration between networks of settlements.

- Taking the rights steps in sustainable travel, energy and in bio-economy to lead on Climate Action in the state's transition to a Low Carbon Economy.

Atlantic Economic Corridor

The Atlantic Economic Corridor (AEC) initiative is a collaborative project between the public and private sectors to maximise the infrastructure, talent and enterprise assets along the western seaboard from Kerry to Donegal, and to combine the economic hubs, clusters and catchments of the region to attract investment, support job creation, improve quality of life and contribute to the Government's regional development objectives.

In this context, the AEC initiative and the Regional Enterprise Plans for the regions along the western seaboard will be mutually re-enforcing in supporting enterprise growth, job creation and investment in the regions concerned.

The AEC initiative involves business representatives, national and local government, State agencies and Third Level Institutions. It is led at Government level by the Department of Rural and Community Development.

Rialtas na hÉireann
Government of Ireland