

**SOUTH-WEST
REGION**

**ACTION
PLAN
FOR
JOBS**

2015-2017

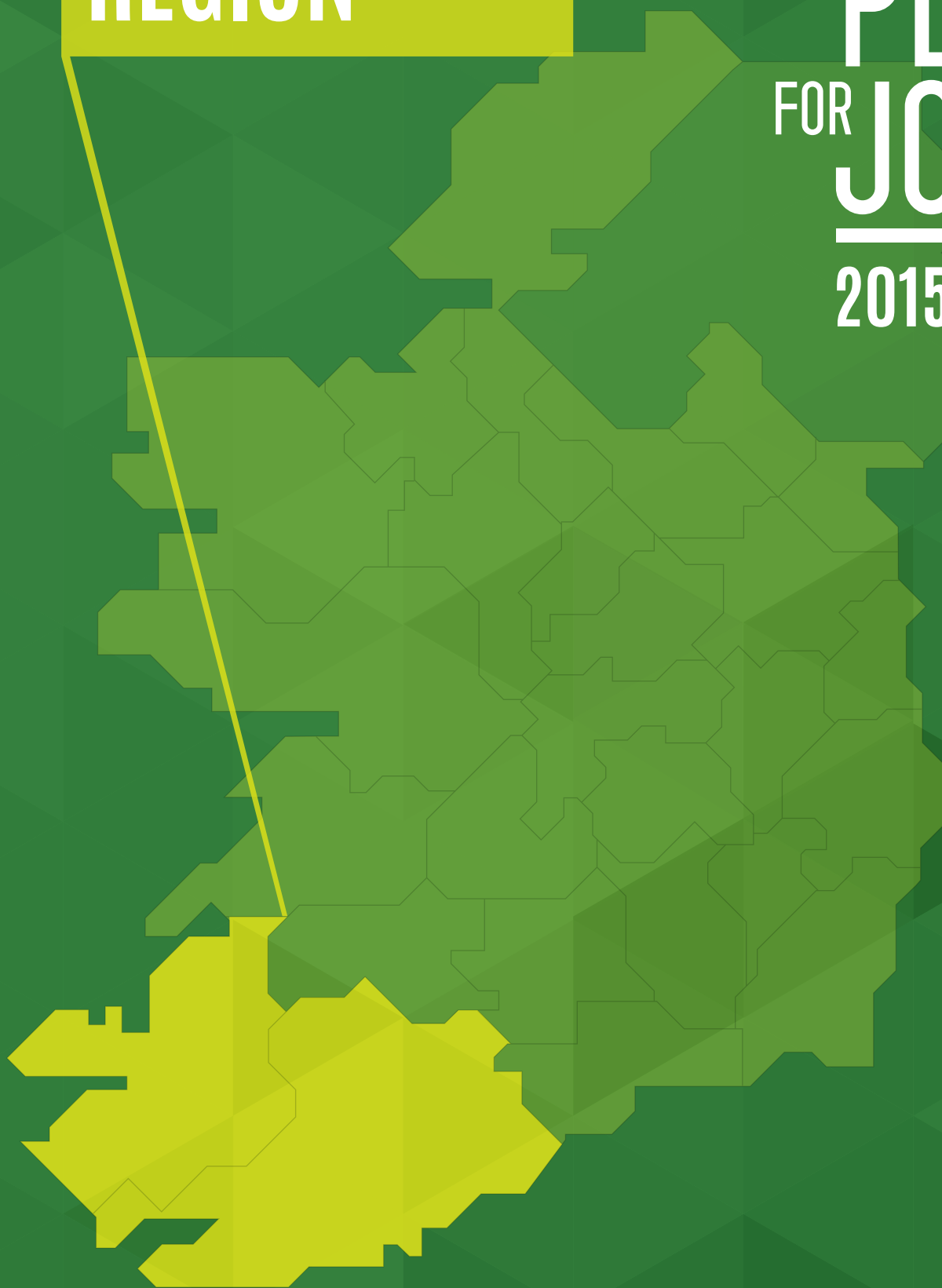


Table of Contents

Foreword by the Minister for Jobs, Enterprise and Innovation, Richard Bruton, T.D.	3
Executive Summary	5
1. Introduction	9
2. Profile of the South West Region	11
2.1 Demographics and Labour Market	11
2.2 Skills Base	13
2.3 Enterprise Base	14
3. Strengths and Opportunities	28
Strengths	28
Opportunities	31
4. Regional Leadership, Governance and Alignment of Strategic Planning	35
5. Collaboration and Building Business Networks	38
6. Building Sectoral Opportunities, Clusters and Ecosystems	40
6.1 Agri-Food and Drink Sector	43
6.2 Tourism	49
6.3 Global Business Services	55
6.4 Construction	58
6.6 Engineering and Manufacturing	59
6.7 Retail	61
6.8 Lifesciences	63
6.9 ICT Sector	64
6.10 Multimedia, Culture, Content and Design	66
6.11 Energy, Green Economy and Marine	69
6.12 New Sources of Growth and Demonstrating Solutions to Grand Challenges	74
7. Branding and Marketing the South West Region	77
8. Driving Entrepreneurship	79
9. Building Enterprise Capability and Connections	86
10. Fostering Innovation	89
11. Attracting and embedding Foreign Direct Investment	98
12. Social and Community Enterprise	102
13. Enhancing Skills and Labour Market Activation	105
14. Enhancing the Business Environment	112
14.1 Property Solutions	112

14.2	Integrated Licensing Applications	113
14.3	Public Procurement	113
14.4	Finance for Growth	114
15.	Key Infrastructure Requirements to Support Enterprise	116
15.1	Broadband and eCommerce	116
15.2	Road Access	118
15.3	Ports	121
15.4	Sustainable Travel	124
15.5	Air Services	125
15.6	Water Capacity	126
15.7	Monitoring Data and Information Management.	127
16.	Effective Execution and Monitoring Progress	128
	Appendices	129
	Appendix A – Employment in IDA Ireland and EI Companies	129
	Appendix B: Range of supports and services available to Startups	133
	Appendix C: Project Delivery Group Membership	136
	Glossary of Terms	136

Foreword by the Minister for Jobs, Enterprise and Innovation, Richard Bruton, T.D.



One of the Government's key priorities when it came in to office was to halt the haemorrhage of job losses and rebuild a sustainable economy based on enterprise, innovation and exports. The Action Plan for Jobs has been the Government's key policy instrument to support job creation and enterprise growth. The first Action Plan, published at the start of 2012, set an ambitious target of increasing the number of people in employment by 100,000 by 2016. Employment figures published by the Central Statistics Office for the first Quarter of 2015 show that we have exceeded this target more than 18 months ahead of schedule.

However, while we have made great progress in addressing our unemployment and competitiveness challenges and in building a new, sustainable enterprise economy driven by skills, innovation and success in markets, we need to sustain the momentum and stretch ourselves further if we are to achieve sustainable full employment by 2018 and ensure that all parts of our regions benefit from the recovery. The pace of progress in the regions needs to be accelerated through targeted supports for enterprise and job creation. Vibrant and competitive regions are important, not just from an economic perspective, but also from a societal point of view. Growing the economic base of regions supports social cohesion and provides opportunities for families to continue to live and work in their local communities.

The Government's 2015 Action Plan for Jobs includes a commitment to develop and publish a suite of regional Action Plans to support enterprise growth and job creation. The Action Plans will complement and contribute to the Local Economic and Community Plans to be developed by the Local Authorities and the regional Spatial and Economic Strategies to be developed by the new Regional Assemblies.

All regions in Ireland have potential for economic growth. It is critical that we focus on the potential within regions to position them as key contributors to Ireland's national growth and the creation of employment. Regions differ from each other in terms of potential, critical mass, stage of development, nature of sectoral strengths, skills profile and innovative capacity.

This Action Plan for Jobs for the South West covers the counties of Cork and Kerry. The core objective of the Plan is to support the creation of extra jobs in the region through the delivery of over 250 collaborative actions focusing on increasing the number of startups, developing the capacity of existing enterprises, and capitalising on the strengths and opportunities of the region.

This Action Plan has been developed on the basis of a series of consultations with stakeholders in the region, identifying particular strengths and opportunities in the South West. Like the national Action Plan for Jobs, the Plan for the South West sets out a series of commitments on the part of public bodies, complemented by some actions from the private sector, which will support enterprise growth and job creation. Further actions will be added on an on-going basis, as new initiatives and commitments emerge, reflecting the dynamic nature of the new regional Action Plans. It is the cumulative effect of these measures - and the collaboration which they will bring about in their delivery - which will make a real and lasting impact on the jobs potential of the region. Action Plan for Jobs-South West Region

While my Department has facilitated the compilation of this Action Plan through engagements with stakeholders in the South West, ownership of the Plan – and ensuring its delivery - rests with the

people, businesses, and public bodies in the South West region. I want to thank all of those who made a contribution to the development of the Plan and look forward to their continued participation in the process.

To further support enterprise growth and job creation in the regions, the Government will provide up to €250 million over the next five years to support the regional Action Plan process. €150 million of this funding will support an IDA property programme, while up to €100 million will be made available through Enterprise Ireland for three separate competitive calls for proposals which will support innovative and collaborative approaches to support jobs creation across the regions.

Richard Bruton, T.D.
Minister for Jobs, Enterprise and Innovation



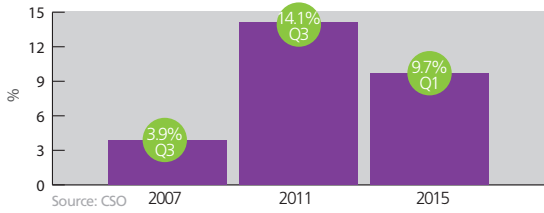
SOUTH WEST REGION





SUPPORTING JOBS GROWTH

Unemployment in the South West is down from over 14% in 2011 to 9.7% in early 2015.



16% INCREASE

In 2014 employment in firms supported by the **S.W. Local Enterprise Offices** increased by 634 to 4,512, an increase of 16% on 2013.

26,634

From 2011 to 2014 direct employment in **Enterprise Ireland** firms is up 3,656 to 26,634, with an additional 34,624 indirect jobs in the economy

Source: DJEI SPD



11,200



277,800 people at work out of a labour force of 307,500 in Q1 2015. Additional 11,200 employed from the South West Region since the launch of the Government's Action Plan for Jobs in Q1 2012.

Source: CSO Q1 2015

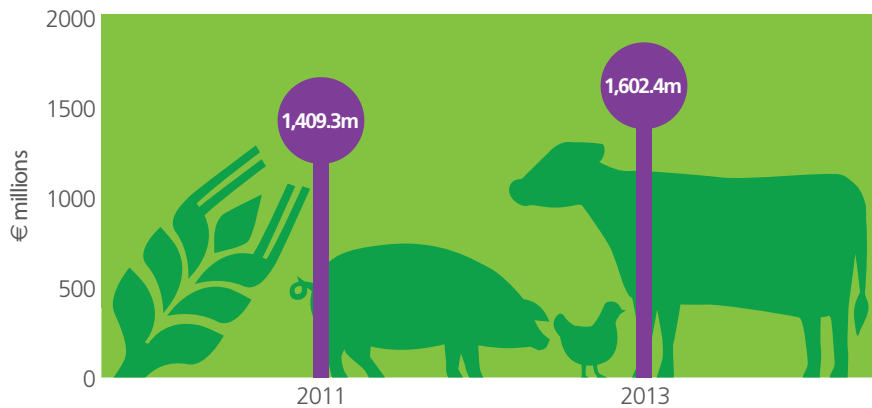
30,488

From 2011 to 2014 direct employment in **IDA firms** in the South West Region increased by 3,936 to 30,488 jobs, with an additional 21,342 indirect jobs in the economy

Source: DJEI SPD

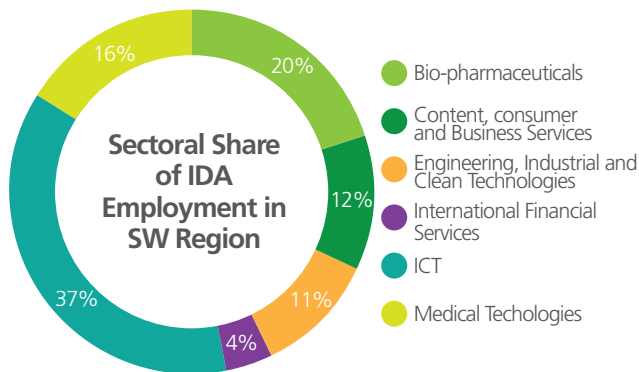


BUILDING COMPETITIVE ECOSYSTEMS AND CLUSTERS



Agricultural Output in the South West increased by 14%, from €1,409.3m in 2011 to €1,602.4m in 2013

Source: CSO



Source: 2014 DJEI SPD

Third Level Enrolments in South West 2013/14 in UCC/CIT/IT Tralee
33,515*

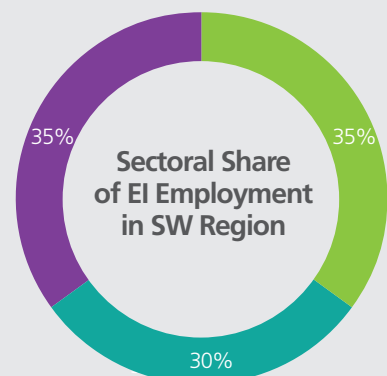
Third Level Graduates in South West 2013/14 from UCC/CIT/IT Tralee
10,813



Source: HEA *Full and Part-time

+9%

Overseas Visitors to the South West increased by 9% between 2011 to 2013, from 1.93 million to 2.11 million in 2013.



- Financial & International Services
- Engineering & Manufacturing
- Food & Natural Resources



Source: CSO, DJEI & EI.

Executive Summary

Our ambition is to achieve full employment by 2018 and vibrant and competitive regions are central to realising that ambition. The aim of this Action Plan for Jobs Regional (APJR) for the South West is to develop the full potential of the region for enterprise and job creation, building upon its assets and areas of competitive advantage. This can only be achieved by a new level of collaboration among key players in the region working to achieve common goals.

This APJR for the South West region builds on the successful APJ National Plan which, each year, looks at how Government and industry can better collaborate to improve the environment for enterprise to grow and jobs to be created.

The primary objective of this APJR is to have a further 10 to 15 per cent at work in the region by 2020 and to ensure the unemployment rate is within 1% of the State average. Achieving this goal in the SW will contribute to the overall ambition of creating sustainable full employment in Ireland from 2018 onwards.

The development of this APJR was based on a genuine bottom-up engagement not just the region's public bodies but also many of its enterprises and business organisations and public representatives. The ambition of this Plan will only be realised through the collaborative effort of all these stakeholders. Our experience of the Action Plan for Jobs at a national level is that where all relevant parties work together very significant results can be achieved. This Plan builds on the range of initiatives underway by the enterprise development agencies, local authorities, and private sector business and representative bodies in the region over recent years to create a better environment for business and we want to build on that collaboration to sustain success.

This collaborative approach has been made possible by a number of reforms put in place:

- the growing impact of the Local Enterprise Office network developed through the close cooperation between EI and the Local Authorities;
- the fresh mandate of the new Education and Training Boards in Cork and Kerry, who like the Higher Education Institutions (HEIs) are now focused on developing a stronger link with their local enterprise base;
- the strengthening of the Regional Offices of IDA and EI with a new focus in their respective national strategies on regional job growth; and
- the emergence of a stronger policy framework to underpin sectoral opportunities with a strong profile at regional level.

These initiatives are having an impact. Over the period 2011 to Q1 2015, the unemployment rate in the South West region has fallen from over 14.1% to 9.7%, below the national average. The South West lost 37,600 jobs during the recession from 2007 to Q1 2012. Today the numbers employed at 277,800 in Q1 2015 are up 4% on the 2012 levels of 266,600.

The enterprise agencies focus most of their support on exporting enterprises and there is a strong base of internationally trading businesses in the region. There are 158 IDA Ireland supported foreign subsidiaries operating from the region employing 30,500 people and there are 26,600 employed in EI supported clients in 717 enterprises across the two counties of Cork and Kerry. Employment in IDA and EI assisted firms increased by 7,600 in the three years from 2012 to 2014, an increase of 15%. Employment growth in the 910 Local Enterprise Office assisted firms in the region is equally strong, with job numbers growing by 634 to 4,512, or 16% in 2014 alone. The challenge is to sustain that rate of progress so as to achieve full employment by 2018.

This challenge can best be met through driving enterprise, innovation and talent development in the region so as to capture fully the benefits of the current enterprise mix in terms of technology and

capabilities. It is crucial to link effectively enterprises and the research base in the region, so as drive an overall upgrading of the industrial structure in Kerry and Cork over the next decade. There is also greater potential to drive entrepreneurship and startups in new high value-added sectors where the region can compete on a sustainable basis in international markets into the future.

This Action Plan for Jobs for the South West Region seeks to take advantage of particular areas of strength and opportunity for the Region by:

- a **diversified enterprise mix** that is increasingly technology intensive and with acknowledged firm-level strengths, skills and capabilities in high-tech and highly regulated manufacturing and ICT-enabled global business services. The region hosts a range of indigenous and foreign subsidiaries operating on international markets including in agri-food and drink, in areas such as pharmaceuticals and medical devices, in precision engineering and in ICT products, services and solutions;
- world renowned **heritage, cultural and tourism** assets and resources and strong brands of Kerry and Cork as destinations in international markets. These natural resources and heritage provides a platform for developing extra jobs potential in areas from digital content to creative industries and design;
- emerging strengths and potential in areas such as **energy, healthcare and smart infrastructure**;
- increasing rates of **entrepreneurship and startups** across the spectrum of sectors from internet technologies to artisan food and design and crafts;
- **productivity levels** are above the State average, buoyed by the presence of multinational firms, with potential to achieve the performance of leading regions in Europe;
- **top-tier research and technology institutions** with burgeoning strengths in areas of direct relevance to enterprises and market demand. The region has a unique mix of education and research assets including UCC – in the top 2% of universities worldwide - Tralee and Cork Institutes of Technology and Teagasc at Moorepark, each involved in world class research;
- a population base of 664,534 in 2011, which has increased by 19% since 2006, with a strong **City Region** and twelve large urban centres that play important roles as pull factors for the region as a whole;
- strong international **physical connectivity**, with European air services from the State airport at Cork and at Kerry airport, together with nine sea ports;
- in the space of a decade, the **transport infrastructure** to the region has been transformed and the region plays a central role along the Atlantic Corridor between Waterford and Limerick;
- **digital connectivity** through a new international broadband connectivity being deployed directly from the region to North America.

The Department of Jobs, Enterprise and Innovation (DJEI) through its agencies in the region, Enterprise Ireland (EI) and IDA Ireland (IDA) together with Science Foundation Ireland (SFI), Údarás na Gaeltachta (ÚnaG) and the Local Enterprise Offices (LEOs) will play a leading role in supporting entrepreneurship and innovation, investment, exports and jobs growth over the period. Other agencies will also contribute to supporting the creation of jobs across key sectors such as tourism, agri-food, seafood, marine and energy and in harnessing the full potential of the natural resources in the region for enterprise and jobs.

This APJR will build on the strategic resources that the Region already has and sets out specific actions to be delivered over the next two years, towards our 2018 ambition. Some of the higher

profile projects and actions that will drive increased employment over the coming years in the South West are:

- **Talent for Enterprise: +100% workforce training and development activity**

 - boosting enrolments on existing apprenticeships to make full use of the training capacity in the region and rolling out new apprenticeships in areas of relevance to industry in the region;
 - doubling workforce training and development activity and investment by enterprise;
 - making full use of the facilities of the Education and Training Boards and Skillnets in the region to increase the employment prospects of the unemployed to meet enterprise needs and for in-company training;
 - linking employers with higher education providers through establishing college-industry advisory boards and through a Regional Forum, developing Further Education/Higher Education engagement and alignment of resources to the key sectoral ecosystem development initiatives in the region;
 - exploiting opportunities for increased Homeworking by rolling out a range of initiatives within the region and connecting with global entrepreneurs that can utilise talent available in an out-reach capacity in remote locations; and,
 - link all schools in the region with local enterprises through an adopt-a-school programme to encourage greater take up of courses relevant to industry needs in the region and through the entrepreneurship programme.
- **World Class Sector Ecosystem Development: +20 per cent in export-led jobs to 2020**

 - driving sector ecosystem upgrading in the areas of ICT, global business services, life-sciences and engineering and high-value manufacturing by establishing industry-led sector ecosystem teams, so as to move the existing indigenous and overseas enterprise base 'one-step-up' in terms of productivity, innovation and exporting in the South West by 2020;
 - exploiting new areas of growth and untapped potential where the region can exploit convergent and entrepreneurship opportunities in energy and grid management, health services innovation, Internet of Things, marine, smart infrastructure and food nutrition;
 - driving linkages between MNCs and SMEs in the region to develop collaborations in the areas of new out-sourcing/in-sourcing models, in procurement and sub-supply, technology and innovation linkages such as for Horizon 2020 (H2020) proposals; skills and training such as in new apprenticeships; and scaling and partnership support for SMEs;
 - strengthening the capacity of the existing base of companies to scale up their business and win new markets and existing markets that generate new job opportunities through supports such as LEAN, Innovation Vouchers, management development and exporting.
- **Supporting Entrepreneurship: + 40-50% startups, scaling and survival of new business**

 - building the pipeline of potential startups, increasing the successful flow of entrepreneurs through the region's enterprise hubs and fast tracking an increasing number into High Potential Startup (HPSU) programmes.
- **Attracting New Investment: +139 FDI investments**

 - strengthening the capacity of the region to attract new inward investment and increase the number of IDA investments by 30-40% over the period 2015-2019, equating to 139 new

investment projects. IDA will also provide an advanced technology building in Kerry in 2016.

- **Agri-Cluster Development: +40% output to 2020**
 - developing the region as an international centre of excellence in agri-engineering, agri-food and seafood production and food and drink product development focusing on agri-technologies, engineering and services - including joint initiatives with the South East region for an effective world-class Southern cluster as part of the new 2025 Agri-Food Strategy.
- **Realising Tourism and Hospitality Potential: +33% overseas tourist numbers and +40% in overseas revenue**
 - leveraging the brand of the Wild Atlantic Way (WAW) and Ireland's Ancient East (IAE) for product and experience development of the Kerry and Cork brands and developing a greater range of products for shoulder season extension; and,
 - developing a Tourism and Hospitality Centre of Excellence for education and training linking Tralee and Cork Institutes of Technology in the region.
- **Research collaboration and commercialisation: +50% enterprise-research collaborations**
 - developing the applied research capacity in the region and stepping up the exploitation of the region's unique mix of research strengths for technology transfer and commercialisation and the transfer of researchers to industry, with a specific focus on ICT, energy, health services, med-tech and life sciences, in agri-food, data analytics and marine.
- **Munster Technological University**
 - combining the strengths and assets of Cork and Tralee Institutes of Technologies to build critical mass and deliver on enterprise skills and research needs in the region.
- **Diaspora promoting Trade, Investment and Entrepreneurship**
 - using Diaspora networks to support entry to overseas markets by enterprises from the region, to attract investment to the region and to advise and network with entrepreneurs in the region, including more structured processes of engagement by the colleges in the region with their alumni, co-ordinated as part of the *Succeed in Ireland* Initiative.

In addition, the local authorities and business representative bodies in the region will take a proactive approach with telecom operators to secure **accelerated roll-out of advanced broadband** services and to be among the first movers in the implementation of the National Broadband Programme.

In total there are 261 Actions in this Regional Plan, encompassing all strands of public and private sector interests that can support enterprise in the region. The successful application and delivery of funding via competitive calls will ultimately determine the delivery of some of the Actions contained in this Plan.

The Plan will be a living document and new actions will be added over time as existing actions are delivered, and new Actions or opportunities present themselves. This Plan will be overseen by a joint public and private sector Regional Implementation Committee including senior executives from the local authorities, and LEOs, IDA, Enterprise Ireland, SFI, Údarás na Gaeltachta, InterTrade Ireland and DJEI, under the auspices of a national Steering Group Chaired by DJEI, and will review half yearly reports on Actions delivered or delayed. These Progress Reports will be published by the Department of Jobs, Enterprise and Innovation.

1. Introduction

The Action Plan for Jobs for the South West Region is about building on the capabilities and strengths of the region, covering counties Cork and Kerry and Cork City, to develop a more dynamic, internationally competitive and sustainable enterprise economy that can provide well paid jobs and secure sustainable full employment over the long term. Good progress has been made since the launch of the National Action Plan for Jobs process four years ago with the rate of unemployment in the SW region has fallen from 14.1% in 2011 to 9.7% in Q1 2015.

The objective of the Plan is to ensure that the environment for business in the South West Region is among the most competitive regions in Europe by 2020, that the region develops to its full potential and that businesses in the region receive the support they need to establish and prosper. The objectives and actions are focused on achieving impacts in terms of jobs, sales and exports, entrepreneurship and startups, innovation, market penetration and access to talent. The stakeholder consultations in the region were clear that fundamental to achieving these impacts is the need to strengthen and deepen regional collaboration – that is through local authorities, enterprise support agencies, county and regional bodies, Higher Education Institutions (HEIs), Education and Training Boards (ETBs), the private sector, industry and enterprise and communities coming forward with innovative ideas to boost job creation in their area and working together to deliver on those actions. DJEI is committed to working with regions in identifying regional strengths, assets and areas of competitive advantage in order to support businesses to startup, invest, succeed, expand, and export.

The South-West has a dynamic and broad based enterprise sector, with predominance in complex Pharmaceuticals Manufacturing, ICT (hardware and services), Food and Drink (including functional foods), Tourism and Agriculture sectors. In addition, medical devices, other internationally traded services, energy services and maritime, together with a recovering retail sector and strong locally traded services sector serving consumer and business markets are important parts of the region.

The South-West derives a high proportion of its Gross Value Added (GVA) from complex manufacturing – the region is good at making things. The region also has a strong and growing ICT sector, underpinned by excellent research teams across HEIs. The presence of important research centres at UCC, CIT, IT Tralee, Tyndall National Institute and Teagasc Moorepark contribute to make the region one of the best performing areas of the country in terms of Higher Education Research and Development (HERD).

There are many initiatives underway within the region to stimulate innovation and given the nature of its existing enterprise and research base, collaboration by a cross section of industry sectors may present real opportunity for differentiation capitalising on convergence opportunities.

The region also has a renowned entrepreneurial culture, from strong family businesses in traditional sectors to successful entrepreneurs and startups in high-tech areas. The entrepreneurial ethos within Kerry was acknowledged in 2011 when Kerry was designated as European Entrepreneurial Region (EER) of the year. The South West region, which is home to globally trading internationally oriented companies offers an attractive proposition for new and emerging companies.

The business representative community also plays an important role in supporting how enterprises grow and prosper. There are a range of business development groups and bodies, some long established bodies such as the Chambers of Commerce and Business/Industry representatives bodies, which continue to be ambitious for their members and the region and are key partners for this South West Action Plan process.

Among the key objectives of the Action Plan are to:

- Increase and sustain startups;
- Attract new inward investment;
- Expand and scale existing companies;
- Ensure highly talented and trained staff;
- Build on existing strengths and develop new opportunities; and
- Develop social and community employment.

In February 2015, the Taoiseach, Tánaiste and Minister for Jobs, Enterprise and Innovation announced details of a five year, €250 million strategy aimed at accelerating jobs recovery in every part of the country. The funding will be made available through IDA Ireland and Enterprise Ireland.

This Action Plan sets out many of the proposals made by stakeholders in the region at both Consultation Forums which took place earlier this year in Cork and Tralee.

The actions are not just a report of activities (business as usual) but rather present new initiatives or retargeted activities directly linked to some of the shared objectives. It is recognised that for the Action Plan to succeed many of the stakeholders in the region will need to play a leadership role in setting ambitions and overseeing delivery.

This Action Plan is being developed at NUTS III level and will dovetail with and contribute to the local authorities' statutory plans and the new Southern Regional Assembly's Strategic Economic and Spatial Strategies.

Like the national Action Plan for Jobs process, the merits of the Plan will be in the contributions that have been made by all stakeholders, with the sum of the parts making a greater impact than the individual elements could do on their own. This Plan reflects the contributions of all Government Departments to enterprise and job creation by highlighting and including specific plans and actions to be taken for each region over the next 3-5 years.

2. Profile of the South West Region

2.1 Demographics and Labour Market

The South West Region consists of Cork City and the counties of both Cork and Kerry. In 2011 the population of the South West region was 665,000 (519,000 in Cork and 146,000 in Kerry), which is 14.5 per cent of the total population of the State. The population of Cork City and County grew by 24% between 2006 and 2011. The population of County Kerry grew by 4% in the same period. The CSO predicts that over the period 2016-2031 the population will increase annually by 0.5 per cent in the South West region¹.

Table 1: South West Population

	Population Census 2011	Population Census 2006	Percentage change 2006-2011
Cork	519,032	418,295	+24%
Kerry	145,502	139,835	+4%
Total South West	664,534	558,120	+19%

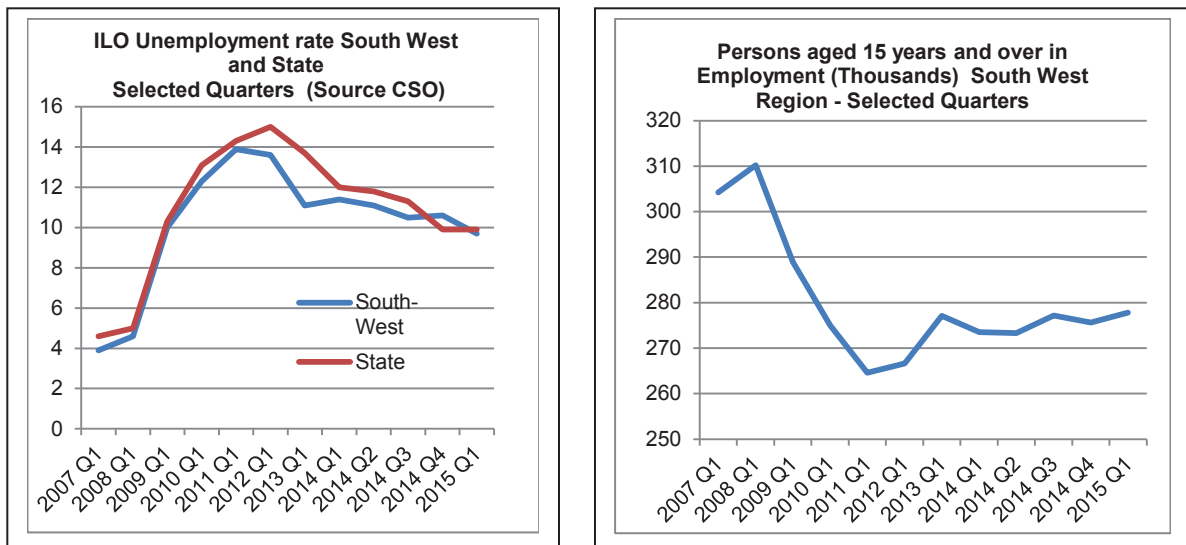
Source: CSO

Over 43% of the region's population (290,000) live in Cork City and its Metropolitan region. By a considerable margin, this is the second largest cohesive metropolitan area in the State. A further 118,000 live, mainly in a network of smaller towns, within the outer commuter zone associated with Cork. The other urban centres in the region include Tralee and environs (23,693), Killarney (14,219), Bandon (6,640), Mallow (11,605), Fermoy (6,489), Clonakilty (4,721), Listowel (4,832) and Mitchelstown (3,677).

The labour force of the South West region is 307,500 as of in Q1, 2015. Of this, 277,800 are currently in employment with 29,700 unemployed. The South West lost 37,600 jobs during the recession from 2007 to Q1 2012. As illustrated in Figure 1, over the period 2011 to Q1 2015, the unemployment rate has fallen from 14.1% to 9.7% in the South West and below the national average of 9.9%, while the numbers employed have increased by 11,200 to 277,800 today and are up 4% on the Q1 2012 levels of 266,600.

¹ <http://www.cso.ie/en/releasesandpublications/er/rpp/regionalpopulationprojections2016-2031/#.VVHavtJ0yDY>

Figure 1. Unemployment Rate (%) South West Region and State and Numbers Employed, Q1 2007-Q1 2015



There were some 47,792 people on the Live Register in the South West region in January 2015, down from 61,634 recorded in the same month in 2012. This represents a fall of almost 29 per cent.

Table 2: Numbers on the Live Register, 2012 & 2015

	Live Register January 2012	Live Register January 2015	% of South West Live Register January 2015	% of National Live Register January 2015
Cork	44,276	33,965	70.50%	9.47%
Kerry	17,258	13,827	28.93%	3.85%
Total South West	61,534	47,792		

Source: CSO

The services sector accounts for 71% of employment in the South West region, up from 63% in 2007, as set out in Table 3. The construction sector accounted for 14% of employment in the region in 2007, and fell to 5.1% in 2013 but has recovered somewhat to 6.7% in 2015. The share of employment in industry was 14.5% in 2015 and 7.5% in agriculture in Q1 2015.

Table 3. South West Employment by Sector, 2007-2014 (selected Quarters)									
Persons aged 15 years and over in Employment (Thousand) NACE Rev 2 Economic Sector									
South West Region						Change Between Q1 2007 and Q1 2012		Change Between Q1 2012 and Q1 2015	
	2007 Q1	2012 Q1	2013 Q1	2014 Q1	2015 Q1	(,000)	%	(,000)	%
All NACE economic sectors	304.2	266.6	277.1	273.5	277.8	-37.6	-12.4	11.2	4.2
Agriculture, forestry , fishing (A)	20.4	12.1	17.6	21.1	20.9	-8.3	-40.7	8.8	72.7
Industry (B to E)	47.8	41.8	45.5	43.8	40.4	-6.0	-12.6	-1.4	-3.3
Construction (F)	43.0	17.4	14.2	16.1	18.5	-25.6	-59.5	1.1	6.3
Services (G to U)	192.5	195.1	199.5	192.5	197.7	2.6	1.4	2.6	1.3

Source: CSO StatBank/Quarterly National Household Survey Main Results / QNQ40

2.2 Skills Base

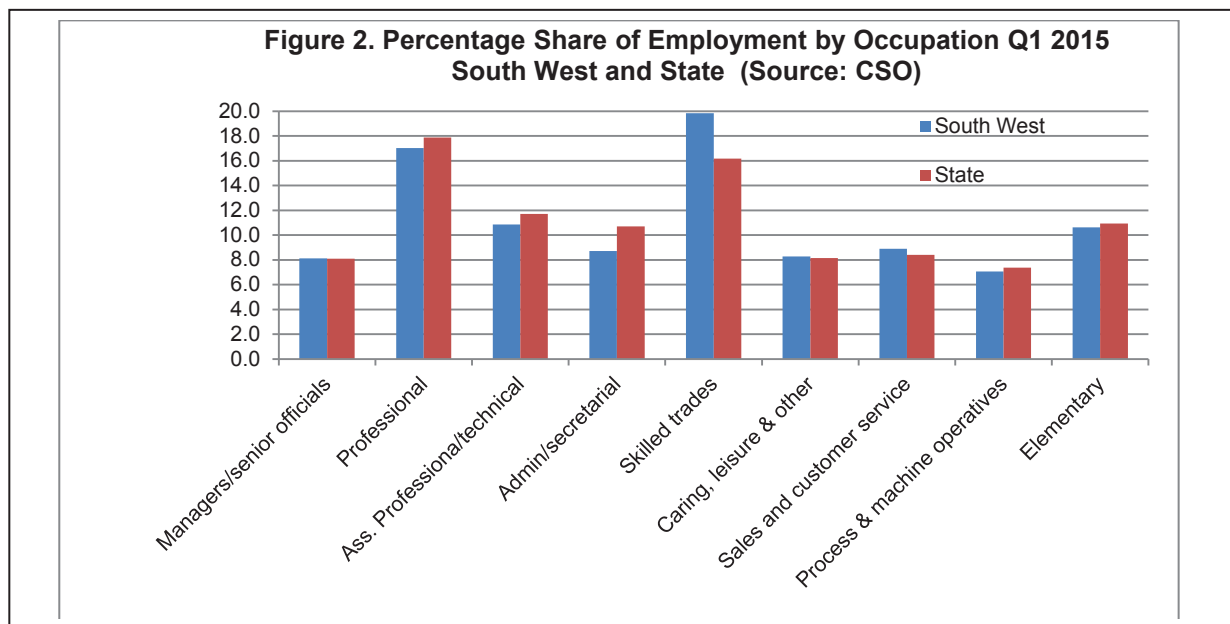
There is a strong skills base in the region. The proportions of the population with second level education are above the State averages and the proportion with third level education is just below the national average, as illustrated in Table 4.

Table 4. Highest Level of Education completed: South West region and national average, 2011		
Level of Education	South West	State
Primary or no Formal	14.0%	15.2%
Lower secondary	17.2%	16.6%
Upper secondary	35.4%	34.4%
3rd Level +	28.6%	29.1%
Not stated	4.8%	4.7%

Source: Derived from CSO Census of Population 2011

In terms of occupations, in Q1 2015 over 77,600 were employed in the professional and associate professional categories (47,300 professional and 30,200 associate professional), as illustrated in Figure 2. Approximately 55,000 persons in the South-West were employed in skilled trades, counting for almost a fifth of total employment in the region; almost a third of those employed in skilled trades (and 6% of total employment) were farmers. There were 29,500 persons employed in

elementary occupations. Just over 19,600 persons were working as operatives, with 24,700 working in sales/customer service, and 23,000 caring and other personal services occupations.



In Q4 2013, approximately 40,500 persons in the South-West region were employed in manufacturing High tech manufacturing (e.g. pharmaceuticals, electronics, optical products, etc.) which was the largest segment accounting for 36%; this was above the national average and was amongst the highest shares for high tech employment across all regions. Medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) combined accounted for 30% of manufacturing employment. Low-tech manufacturing accounted for almost a third; within this segment, food processing and beverages alone accounted for one fifth of total manufacturing employment.

2.3 Enterprise Base

The South-West has a dynamic and broad enterprise sector with predominance in Pharmaceuticals, ICT (hardware and services) and Food, and significant potential in tourism, medical devices, other internationally traded services and maritime related activities focussed primarily on Cork Harbour. The region has two airports with both having international flight destinations and is further served by Shannon airport. Cork is well served from an infrastructure perspective with an international airport, motorway connectivity to Dublin and a range of property options for offices and other activities. Investment conversion rates are high for Cork and Local leadership is recognised for their proactivity in relation to the approach and focus on developing Cork.

Table 5. Employment in Enterprise Agency Supported Companies (Selected Years)							
South West Region				Change between 2006 and 2011		Change between 2011 and 2014	
	2006	2011	2014	(,000)	(%)	(,000)	(%)
All Sectors	52,269	51,039	58,558	-1,230	-2.4	7,519	14.7
Manufacturing	37,869	34,340	38,254	-3,529	-9.3	3,914	11.4
International Services	9,439	12,032	15,042	2,593	27.5	3,010	25.0
Financial Services	1,084	1,973	2,528	889	82.0	555	28.1
Other Sectors	3,877	2,694	2,734	-1,183	-30.5	40	1.5

Source: DJEI SPD 2014 Annual Agency Employment Survey

Employment in IDA and EI assisted firms has increased by 7,600 in the three years from 2012 to 2014, an increase of 15% in three years. LEO-assisted employment also increased by 634 in 2014 to 4,512 in the region, with 910 LEO clients in Cork and Kerry combined. There is strong base on which to build for the future with 158 IDA Ireland supported firms in the region employing 30,488 people and 26,634 employed in EI supported clients in 717 plants across the two counties of Cork and Kerry in 2014.

Table 6: South West Labour Force and Employment, ('000) 2007, 2012 & 2014/Q1 2015					
	2007	2012	2014/ Q1 2015	Change 2007 to 2012	Change since APJ Launch Q1 2012
Labour Force (Q1)	316.4	308.5	307.5	-7.9	-1.0
EI	23.9	23.0	26.6	-0.9	+3.7
IDA	25.9	26.6	30.5	+0.7	+3.9
LEOs	NA ²	NA	4.5		
Udaras na Gaeltachta	2.1	1.6	1.4	-0.6	-0.1
EI & IDA	49.8	49.5	57.1	-0.2	+7.6
Total Employed (Q1)	304.2	266.6	277.8	-37.6	+11.2
Unemployed in Region	12.2	41.8	29.7	29.6	-12.1
Unemployment Rate (%)	3.9	13.6	9.7	9.7	-3.9

Sources: DJEI analysis of CSO QNHS, DJEI Annual Employment Survey, LEO EoY Statement 2014

² Note 1: The metrics previously being used by the County and City Enterprise Boards (CEBs) were revised to make them more relevant as a means of reporting on the performance of the LEOs and hence comparable statistics for earlier years are not available.

The South West had the second highest Gross Value Added per worker in the state in 2012 at €44,391 behind Dublin and is noted for Bio/Pharma and ICT credentials mainly in Cork. Three 3rd level institutions are located in the region with circa 30,000 full and part time students.

Table 7: Comparison of GVA by Region, 2012

Gross Value Added	
Border	€19,016
Dublin	€51,839
Mid-East	€22,863
Midlands	€18,638
Mid-West	€27,464
South-East	€23,588
South-West	€44,391
West	€28,256
State	€34,308

Source: CSO

IDA Ireland

IDA Ireland has set new and ambitious Foreign Direct Investment (FDI) targets for each region in the country which will act as collective goals for stakeholders in each region to work together in order to deliver on these targets.

IDA Ireland is targeting a minimum increase in investment of 30 to 40 percent in each region outside Dublin over the next 5 years (2015-2019).

IDA Ireland’s remit is to attract foreign direct investment to Ireland and importantly, thereafter to work with the existing base of client companies to encourage them to sustain, grow and expand their business presence here. In doing so, IDA client companies generate valuable employment throughout the country and contribute significantly to regional economies in which they are located through salaries and consumption of goods and services.

Over the past decade there has been a decline in traditional manufacturing activity locating in Europe with a corresponding increase in business services activities. By end of 2014 Ireland has scored well in winning a large amount of both. Today, company business activities are more sophisticated than before, therefore when expanding internationally, companies forensically investigate a number of locations globally.

International competition has become extremely intense and continues to increase mainly dominated by Metro city regions (populations of one million plus, such as Dublin, London, Manchester, Boston, Berlin and Paris). In the SW Region the principal magnet for foreign investment

is the Cork Metropolitan Region, where the population within one hour commute is at 408,000, with strong growth projected. The Cork Metropolitan Region with a high level of maturity in its economic base demonstrates the attributes of successful metro regions. Outside of Dublin, the Cork Metropolitan Region is the most advanced and developed alternative metro region in the state. It offers significant potential to the South West Region from which further targeted and progressive growth can be achieved of benefit to the entire region.

IDA promotes locations that are a good fit between investor requirement and the Region's ability to meet these exacting criteria. These criteria include a critical mass in population terms, the existence of clusters of companies in specific industry sectors/activities, the ability to attract and develop appropriate skills (talent), well developed infrastructure, property solutions and place-making.

Employment Levels in IDA Client Companies in the South West³

There are 158 foreign owned multinational companies based in the Region in 2014, employing a total of 30,488 (permanent and other jobs)⁴. The main centre for investment by these firms is Cork, where 146 firms employ 28,545 people. The operations of multinational companies present in the region and the resulting employment has increased by almost 6 per cent and 17 percent respectively since 2008. Some 17.4 per cent of IDA Ireland created jobs in 2014 was located in the South West region.

Enterprise Ireland

EI works with Irish companies to help them start, grow, innovate and win export sales on global markets. In this way, we support sustainable economic growth, regional development and secure employment. As an open economy, export success is fundamental to regional and national growth.

The development of Irish-owned companies is important because locally owned businesses are more likely than others to:

- Generate a self-sustaining cycle of growth and reinvestment. Company's profits are more likely to remain in Ireland and seek new investment and business opportunities within existing businesses or new startups;
- Form part of a balanced portfolio of economic activities that provide insurance against technology, sector or market-specific shocks;
- Provide and sustain a base of sub-supply and services companies to service the multinational company base; and,
- Generally operate a wide range of business functions in Ireland and provide opportunities for employee advancement and for the development of world-class companies.

Enterprise Ireland's client base in the South West are in three main categories;

- Manufacturing and internationally traded services companies⁵ employing ten or more people (with a focus on exporting or with the potential to export);
- Innovation-led Startups with the potential to grow in international markets;

³ See Appendix A

⁴ Forfás Employment Survey 2014

⁵ Examples include sectors such as Electronics, Engineering, Business Process Outsourcing (BPO) Dairy, Beef sectors, Financial Services, Procurement, Software, Digital Media and Internet

- Irish food companies, both those home-grown in Ireland, and those that are overseas owned or controlled.

Employment Levels in EI Client Companies in the South West⁶

There were 717 Enterprise Ireland supported businesses in the South West Region in 2014 employing a total number of 26,634, representing a net increase of 3,656 since 2011. The greatest increases in employment over the three year period 2011-2014 took place in International Services and Financial Services with employment growing by 52.4 and 25.6 per cent respectively. Full time jobs in Enterprise Ireland supported firms in Cork grew by 3,150 over the period 2011-2014 and increased by 35 over the corresponding period in Kerry.

With over 8,000 net gains in employment nationally over the period 2013- 2014 - a record performance by EI client companies - most notable was the fact that the South-West region accounted for around 20% of the gains compared with Dublin at around 26% .

Direct Approvals to Support In-Company Development Projects

Between 2010 and May 2015, Enterprise Ireland approved almost €120 million directly to client companies in the South West.

All funding to EI client companies is co-funded. Prior to drawdown, the company must demonstrate that they have undertaken the project as agreed with EI and in line with eligible expenditures. As such EI funding leverages substantial company spend on the projects undertaken. Many of the inputs to such projects will be sourced in the region.

Enterprise Ireland's Role

Enterprise Ireland does not have a mandate to work with locally traded services companies or with micro-enterprises (employing less than ten) but works extremely closely with colleagues in the Local Enterprise Offices in the South West ensuring that targeted supports are available to companies based on their particular stage of development.

Enterprise Ireland provides strategic support (aimed at developing capability within companies) and financial supports (for co-funded development projects) Very often both are combined to maximise the impact of the supports provided.

Such supports are aimed at all aspects of a company's business plan and are designed to work together and mutually reinforce each other. Supports cover anything from management development programmes, export development programmes, Lean/productivity improvement, various financial supports (including grants to undertake feasibility, R&D) the provision of Equity to startups, access to 31 Overseas Offices around the world, access to Mentors, access to third level research.

In simple terms, Enterprise Ireland's strategy for working with South West Client on this agenda covers the following elements:

- Entrepreneurship & New Companies;
- Non-Exporting Established Companies;
- Exporting Established Companies;
- Community Enterprise.

⁶ See Appendix A

Entrepreneurship & New Companies

Developing the pipeline of South West entrepreneurs and startup companies with the potential to trade internationally in the future in cooperation with the Cork and Kerry LEOs and Cork Institute of Technology (the Rubicon Centre) and Institute of Technology Tralee is a priority for EI.

In addition, the region has a world class University, University College Cork, which in addition to world class third and fourth level STEM and humanities educational programs has a high concentration of leading-edge research centres that work closely with industry and are developing and attracting significant human capital and entrepreneurial opportunities. UCC licenses in the region of twenty technologies to industry every year and typically creates two spin-out companies per annum, which it aims to double in the next 2 years. UCC's IGNITE Graduate Enterprise and Gateway UCC business Incubation programs are key enablers of graduate and 4th level entrepreneurship and will be further augmented by the UCC Business School and an undergraduate Enterprise program.

Non-Exporting Established Companies

Working with domestically focussed companies with the potential to export via the Potential Exporters Division (PED), regionally-based seminars, workshops, on-line diagnostic tools, market research resources are all provided to companies seeking new opportunities and preparing to enter new markets.

Established (Exporting) Companies

Enterprise Ireland engages with established companies based in the South West in developing their capability to consolidate and deepen their footprint in existing export markets. Supports range from LEAN, R&D, Management development, funding and access to 30 overseas offices – all as part of a comprehensive growth strategy.

Community Enterprise Centres (CECs)

Enterprise Ireland, in association with the former County Enterprise Boards, Local Development Groups and other local community organisations and most especially the South West Local Authorities cofunded the establishment of nine Community Enterprise Centres across the South West region, of which three are in the South West region providing employment for 100 people.

Údarás na Gaeltachta

Established in 1980, Údarás na Gaeltachta is 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.

The authority endeavours to achieve that objective by funding and fostering a wide range of enterprise development and job creation initiatives and by supporting strategic language, cultural and community based activities.

In 2014, there were 1,436 people employed in Údarás supported companies in the South West region. The main sectors in these Gaeltacht regions are (i) Manufacturing, (ii) Food, (iii) Tourism (iv) Fish processing and aquaculture (v) Audio visual and Digital Media.

Údarás na Gaeltachta has regional offices in Baile Mhic Íre, Co. Cork and Daingean Uí Chúis, Co. Kerry in the South West region.

Údarás na Gaeltachta has a unique role as the regional authority charged with a wide range of development activities in the Gaeltacht. An tÚdarás works with other public bodies to deliver on its key objectives and projects in each region.

Economic Mission

Údarás encourages investment in the Gaeltacht through a range of financial and non-financial incentives for new and existing enterprises in the Gaeltacht.

The organisation supports businesses in developing new markets, technologies, products and strategic alliances through research and development. Gaeltacht companies span a range of commercial sectors, including life sciences, ICT, tourism, fish processing and aquaculture, renewable energy, food, niche manufacturing, audio visual and digital media, arts and crafts.

Cultural Mission

All of the organisation's activities have the aim of preserving and promoting the Irish language at their core. Údarás funds a range of strategic language and cultural initiatives as well as supporting the Irish language through its own practices.

Údarás supports a range of initiatives and collaborates with individuals, community groups and companies which embrace Irish and provide the everyday settings in which the language flourishes, such as:

- Language Services Centres;
- Irish Language Pre-schools;
- Irish in Business; and,
- Language Learning Incentives.

In the South-West region, the Gaeltacht areas comprise of (i) the Muskery Gaeltacht in West Cork. (ii) Oileán Chléire, (iii) the West Kerry Gaeltacht and (iv) the South Kerry Gaeltacht. In this region, the Cork and Kerry Gaeltachtaí have a combined population of over 12,500 and represent 13% of total Gaeltacht population.

Local Authorities

Local Government in the region comprises of the three Local Authorities (LAs) of Cork City Council, Cork County Council and Kerry County Council. These authorities in addition to their roles in local democracy, provision of roads, housing, environmental protection and water services, are the statutory planning agencies for their functional areas. Their role in planning for the future of their areas is extensive covering Development plans, Land use and now Local and Economic Planning. The Local Authorities have traditionally provided for enterprise supports through development of infrastructure including lands and buildings and have undertaken specific development to facilitate industrial and commercial projects. Under recently enacted legislation the Authorities remit is further extended to lead the developmental support for SMEs in their areas through the integration of the former County Enterprise Boards into their structure. This has been accompanied by assignment of additional resources to the Local Enterprise Offices and provision of match funding.

Local Enterprise Offices

Since April 2014 Local Enterprise Offices (LEO) in the region have been providing advice, information and support to entrepreneurs. There are four dedicated teams across the South West region operating within the remit of three local authorities:

- Cork City Local Enterprise Office;
- Kerry Local Enterprise Office;
- Local Enterprise Office Cork North & West; and
- Local Enterprise Office South Cork.

These LEOs serve as a first stop shop to provide support and services to start, grow and develop micro business in each local area. The LEOs will become the first-stop-shop through which all information in relation to State supports for small and micro businesses can be accessed. These offices will deliver quality access to a number of national and local programmes focussed on new business startups and micro business in a pro-business environment. The utilisation of the skills and expertise of the local business community.

The LEOs are embedded within the Local Authority structures and provide vital support for local business across a range of actions. The range of services and supports which offered by the LEOs is set out as follows:

Business Information & Advisory Services

- General business advice and information provision: Business Planning, Financial Advice, Management and Accounting, How-to Guides etc.
- Advice and information on rates, planning, licensing etc. including cost reductions e.g. water conservation and waste minimisation
- Information and access to other government services such as:
 - Revenue [Seed Capital Scheme, Employment Investment Incentive Scheme (EIS), Revenue Job Assist]
 - Social Protection/National Employment & Entitlements Service (NEES) [Back to Work Enterprise Allowance]
 - SOLAS [Employer Job Incentive Scheme, Training]
 - Companies Registration Office
 - Credit Review Office
 - Other services for example, Údarás na Gaeltachta, Western Development Commission, Fáilte Ireland etc.
 - Advice and information for local businesses on accessing public procurement processes
 - Advice on energy efficiency, sustainable development and alternative renewable energy sources

Enterprise Support Services. The LEOs in the South West provide the following:

- Financial support for startup and business development.
- Training supports e.g. Start Your Own Business Programmes, Management development support etc.

- Access to commercial/enterprise space
- Mentoring
- Marketing
- Access to dedicated business networks
- Product and Service development
- Development of web-enabled services with a focus on trading online
- Maximising the impact of Community Enterprise Centres in local areas
- Access to Microfinance Ireland Loan Fund
- Progression pathway for high potential startups and high growth companies to Enterprise Ireland including access to Business Angels, New Frontiers Programme etc.
- Access to promotional space

Entrepreneurship Support Services

- Education – Primary & Second level programmes
- Female entrepreneurship
- Senior entrepreneurship
- Development of clusters
- Enterprise Awards
- Enterprise promotional activities

Local Enterprise Development Services

- Development & implementation of local enterprise plan
- Input into County Development Plan
- Development of partnerships with relevant agencies e.g. North/South development
- Promotion and marketing of local areas as locations for investment in conjunction with the appropriate national body e.g. IDA
- Identifying & developing projects & programmes including leveraging resources to implement these programmes and those funded from non-core resources
- Development of appropriate enterprise infrastructure at county/city level
- Management of local authority enterprise infrastructure or assets e.g. enterprise parks
- Acting as an enhanced resource for Government to undertake one-off initiatives
- Assisting in development of County/City Economic Strategies as proposed in the Local Government Reform Programme
- Direct engagement by Local Authority with businesses in difficulty.

Local Enterprise Offices Competitive Call

A €5m fund to enable the 31 LEOs to fund initiatives focused on clearly defined opportunities, weaknesses or business challenges impacting on micro-enterprise locally, regionally and nationally in order to grow and sustain employment and scale micro-enterprise was launched in May 2015.

The €5m fund will cover the period 2015 – 2017 of which €500,000 will be available in 2015 with the balance expended over remaining period and applicant LEOs can apply for a maximum of €250,000 per project. Collaboration on initiatives between two or more LEOs from within the network of 31 LEOs is essential.

Priority will be given to new approaches that build on, and strengthen, the entrepreneurial ecosystem throughout the country and an innovative approach to stimulating ‘best practice’. A prerequisite for proposals is the need to demonstrate innovative solutions to fostering and creating employment. Proposed projects will not replicate existing programmes or schemes.

Illustrative examples of eligible initiatives include but are not limited to the following:

- Procurement: Improving the procurement capability of micro-enterprise via initiatives to upskill and upscale;
- Sectoral development: Networking, and building capability within microenterprise to pursue sectoral opportunities;
- Entrepreneurship and startup creation: Promoting entrepreneurship and startup creation in-line with Government policy.

In-line with the national remit of LEOs, the specific objectives of this fund are:

- To strengthen microenterprise locally, regionally and nationally in order to create jobs, grow enterprise and support the progression of clients to EI;
- To foster collaboration, networking and a joined up approach to national, regional and local micro-enterprise capability building, growth and job creation;
- To achieve additional job creation and enterprise growth through connecting the 31 LEOs regionally and nationally.

The economic impact of the €5 million competitive LEO fund will be measured by:

- Number of new jobs created (Jobs sustained; new jobs in startups; new jobs in existing businesses);
- An increase in the capability of microenterprise sector locally, regionally and nationally;
- New clients progressing to Enterprise Ireland.

Community Enterprise Centres

Community Enterprise Centres (CECs) provide a supportive environment for entrepreneurs and support the development of local entrepreneurship in urban and rural locations. Since the Community Enterprise Centres scheme was established in 1989, €61.4 million has been approved and over 100 CECs have been set up across the country.

There are three Community Enterprise Centres (CECs) located in the South West employing approximately 100 people.

Table 8: Overview of CECs in the South West

Community Enterprise Centre	Occupancy rates	Square Footage
Killarney Technology Innovation Ltd	95%	13,100
Macroom Environmental Industrial Park	95%	13,000
Hatherton Ltd , Youghal	95%	1,395

Source: EI

Bord Iascaigh Mhara

Established under the Sea Fisheries Act 1952, BIM is the state agency with primary 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, thereby maximising the returns to industry stakeholders and the socio-economic contribution to communities in coastal regions and Ireland as a whole." 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 on the Irish seafood industry. The agency is governed by a non-executive Board, comprised of six directors, including the Chairman, appointed by the Minister for Agriculture, Food and the Marine. BIM staff members are located at the agency's headquarters in Dun Laoghaire, the National Seafood Centre in Clonakilty, Co. Cork, and in other locations around the coast. Launched in 2013, the Board's current strategy, [BIM Strategy 2013-2017](#), is an action plan to deliver 1200 jobs and €1 billion seafood sales by building scale and enhancing competitiveness in the Irish seafood sector.

Higher and Further Education

UCC has a student population of 20,700, for 2014-2015, is an internationally competitive, research-led University that plays a key role in the development of Ireland's knowledge-based economy. Their research strategy is focused on creating major centres of excellence for world-class research and is one of the best-funded research universities in Ireland. In 2013-2014, UCC's research investment reached almost €84 million and their researchers now collaborate with almost 700 of the world's top universities across 110 countries.

In 2014, 6,928 students graduated from UCC. In May 2015 UCC was recognised as one of the leading universities worldwide for scientific research in the [CWTS Leiden Ranking 2015](#). UCC topped the ranking in Ireland, and now holds the 16th position in Europe and 52nd worldwide. The University typically spins-out 2 companies per annum and in 2014 concluded 22 technology licensing deals with indigenous and multinational companies. Since 2011 through its GATEWAYUCC Innovation and Enterprise initiative UCC has supported over 25 startup companies which currently employ 150 jobs and contribute an estimated €12m in wages and €3.5m in tax annually to the economy. Through its IGNITE graduate Enterprise Program established in 2011 with LAs and LEOs, UCC has supported the establishment of almost 40 graduate-led startup businesses in the region and has created 62 graduate jobs in the 2011 to 2014 period.

University College Cork as a research –led university ranked in the top 2% of universities worldwide is a key driver of economic growth in the region. As one of the largest employers in the region, the impact on the economy both directly and indirectly is very substantial. It is estimated that UCC contributes over €1billion annually to the regional economy.

The growth in internationalisation of the university with increasingly diverse student cohorts, has a particular benefit to the region in terms of the indirect impact on business. It is estimated that the economic impact of UCC’s cohort of over 3,000 international students supports over 1,000 jobs in the region. The graduates and postgraduates emanating from the university including highly qualified PhD graduates both local and attracted to the region through leading research centres at UCC, including Tyndall, APC, ERI etc are a key driver for economic growth especially in R&D active employers.

The University’s role as a provider of Adult continuing Education (ACE) is also a key enabler of job and business sustainability and economic value creation in the region. Partnership and collaboration with external stakeholders including industry , development agencies etc is a daily feature of the research teams across the university campus, linking the university research community with diverse stakeholders across the region. For companies collaborative research programmes underpin internal R&D programmes providing access to state of the art infrastructure. UCC’s success in the SFI Research Centres programme, the largest ever combined state- industry investment in research highlights the well-developed tradition to effective and in depth engagement with industry partners which underpins the research centres across the university. <http://www.ucc.ie/en/about/uccnews/archive/2013/fullstory-215713-en.html>.

The university acts as a catalyst linking its stakeholders in the region to global research and knowledge, disseminating leading developments to different stakeholders in the region. The peer reviewed research income within the University of typically >€80M per annum represents the largest expenditure on research in the region. UCC also plays a leading role in entrepreneurship support and in commercialisation of research in the region in conjunction with CIT and Teagasc. While UCC interacts in the region it is also active nationally and internationally and thereby is one of the most effective conduits linking the region to the globe.

Cork Institute of Technology, with a (Full-time & Part-time) student population of 10,000 for 2013-2014, has a number of vibrant and successful research, innovation, knowledge exchange and enterprise support centres which have had many notable achievements and have been successful in attracting Irish, EU and international funding. CIT has a number of leading Research Centres including NIMBUS, CAPP and MEDIC with expertise in Embedded Systems, Applied Photonics and Medical Devices respectively. In 2013, 3,088 students graduated from CIT. CIT’s Rubicon Centre is one of Ireland’s leading business incubators, and currently houses 52 knowledge-based startup companies, employing over 200 people. It operates a number of successful programmes such as New Frontiers (two phases), and the EI supported Exxcel programme for female entrepreneurs in the STEM disciplines. The IT Tralee Tom Crean Business Centre is home to over 20 knowledge-based startup companies.

Institute of Technology Tralee has a student population of 2,815 for 2013-2014. Their research programmes are organised through a ‘pillar’-type structure within the Research Institute whereby defined areas of specialism/potential centres of excellence evolve and support interdisciplinary research programmes. ITT has a number of leading research centres including IMaR, ShannonABC, IAHT, UNESCO Chair in Inclusive Physical Education, Sport and Fitness Recreation and CEED. In addition to the funded research, significant research work is being undertaken by staff members as part of their studies in Master and PhD programmes. In 2013, 797 students graduated from IT Tralee.

The South West is linked with other regions on a research basis via the Atlantic University Alliance (AUA) which is a consortium of three Universities on the Atlantic coast of Ireland which aims to pool the individual expertise and resources of its constituent Universities making them available through a number of joint projects in the area of training, education and R&D. The Insight Centre for Data Analytics is a joint initiative between University College Dublin, the [National University of Ireland at Galway](#), [University College Cork](#), and Dublin City University. Insight was established in 2013 by Science Foundation Ireland with funding of €75m. Insight combines the skills of leading researchers with cutting-edge technologies from diverse research areas, work closely with industry partners to develop next-generation data acquisition and analytics solutions for important and diverse application areas.

Education and Training Boards

Cork Education and Training Board (CETB) is the consolidation of the former City and County VECs and FAS services, providing Primary, post Primary and Further Education and Training from level 1 to 6 on the NFQ. Approximately 35,000 learners, both full and part time will engage with CETB further education and training services across Cork City and County in 2015.

CETB is the second largest Education and Training Board Nationally. CETB provides for almost 11,000 second level pupils in 29 post primary schools and centres and is co-patron in a further 12 community and comprehensive post primary schools in Cork City and County. Within the FET sector, CETB is the second largest provider of PLC courses nationally (levels 5 and 6) 5,384 places delivered across 13 centres spread across the City and County. Cork College of Commerce is the largest PLC College in the Country which also has a dedicated Hospitality and Tourism training facility. The PLC sector is a significant provider in Office Administration, Business, Healthcare, ICT, Design, Art and Beauty, Sports and Recreation studies. The four large PLC colleges have formal progression schemes in place with the CIT and WIT. The Training Centre is the largest of its kind in the Country, providing 5000 training places specifically targeting employment outcomes. It has dedicated facilities for training in Life Sciences, Metal fabrication and CNC. The centre is also a Prometric / Pearson Vue test centre heavily utilised by local IT companies. The CETB provides second chance educational opportunities through 12 Youth Reach Centres and 2 Community Training Centres it also provides a significant level of Adult Basic Education and training through its adult literacy, Community Education, BTEI (Back to Education Initiative) and VTOS services across the region.

CETB works closely with SOLAS on strategic planning and increased alignment of FET provision and FET related employer skills needs.

Kerry Education and Training Board (formerly Kerry Education Service – the VEC in Kerry) was established on July 1st 2013. Kerry ETB is a statutory agency with responsibility for the delivery of Education and Training services in Co. Kerry. Kerry ETB is a large organisation with an annual budget of circa €55 million and employing over 1,000 members of staff. The ETB has over 3000 students enrolled in full time education and provides over 1500 Further Education and Training (FET) courses annually catering for approximately 16000 learners.

In terms of skill development and meeting the needs of local enterprise Kerry ETB is a key resource in the county. About 16,000 people benefit from full and part time education and training courses offering a range of qualifications (from NFQ levels 2-6) that prepare adults and school leavers for entry to the labour market, further education and progression to higher education with special access arrangements for those aspiring to courses at the Institute of Technology Tralee.

The two largest Post Leaving Certificate (PLC) Further Education Colleges are located in Tralee and Listowel with PLC courses also provided in Killarney and Caherciveen. The four Vocational Training Opportunities Scheme (VTOS) centres offer a mixture of second chance opportunities and adult

Leaving Certificate options. Youthreach is available to early school leavers in several towns. There are eight Adult Literacy and Basic Adult Education Centres spread around the county.

Given that 75% of the population live outside of the main county towns Kerry ETB is well structured with four Adult Education Centres providing access to education and training in the rural areas in addition to the Community Education programme which is available in every parish. Kerry ETBs Back to Education Initiative (BTEI) is a key part time route to skills for many people offering skills for the economy.

This suite of education provision ensures that county Kerry has a skilled workforce in essential areas of the local economy such as Tourism and Hospitality; Retail; Business and Administration; ICT; Sport and Recreation; Health Care and Childcare; Media; Art, Craft and Design; Hair and Beauty; Life Sciences such as Animal Care and Laboratory Techniques; Agriculture and Horticulture; Construction and Engineering.

The Kerry ETB Training Centre in Tralee offers a choice of cutting edge courses from one year long Traineeships to Apprenticeships over four years, short specific skill day courses as well as blended eLearning and evening courses. The Training Centre caters for up to 3000 people. The Training Centre has National Specialised training programs and facilities in the areas of Energy Generation, Transmission & distribution and in Broadcast Media Production. The following are recent innovative additions: Overhead Lines; Java Programming; Surf Instructor and Beach Life Guard. The Centre is a National Centre of Excellence in Digital Media skills provision and Wind Turbine Maintenance. The Kerry ETB Training Centre is also responsible for Community Training Centre provision to young people out of mainstream school and provision to people with disabilities via the National Learning Network.

Kerry ETB works with employers in business and industry to design bespoke programmes to meet specific skill gaps and ongoing staff development needs in various local companies. Examples range from basic skills training in the areas of literacy, numeracy and ICT for large retail stores to intermediary skills in financial services companies and high end training in Welding for global export and also in Fibre Technology Distribution.

Through its employer engagement strategy, in addition to work in the area of future skill needs and research into models of work experience and on the job training, Kerry ETB has the capacity to link with the needs of local industry so as to make an impact in terms of job creation and sustaining economic growth.

At second level, the eight Kerry ETB schools each have their own creative way of nurturing innovation, ranging from a move to iPads instead of books in one school, to a robotics programme in another school. Currently there is an increased focus on the use of ICT in the classroom, practical science and STEM projects as well as opportunities for entrepreneurship at second level.

3. Strengths and Opportunities

Strengths

Enterprise mix. The South West has the second highest Gross Value Added (GVA) per worker in the State in 2012 at €44,391 behind Dublin. The Region is also noted for the broad mix of sectors with established and emerging clusters evident across a number of sectors. There are strong established clusters in Life Sciences (including Biopharmaceuticals and Medical devices); Agri food; ICT (Both Hardware, Software and services); and International Services encompassing Business Process outsourcing, shared services, global business services and international financial services). The South West region is a growing base for internationally traded services. Employment in EI supported International Services and Financial Services firms over the three year period 2011-2014 grew by 52.4 and 25.6 per cent respectively.

There is a particularly strong focus on manufacturing across the region. The manufacturing sectors (including Pharmaceuticals, Medical Technologies, Food, ICT and Engineering/industrial products) are particularly strong in the South West with the region deriving a higher proportion of its GVA from manufacturing than any other region nationally. There is also a strong entrepreneurial spirit in the region, across both Cork and Kerry.

Tourism. The unique quality of life in the South West region is key to an exceptional tourism product and the creation of jobs. The South West region has a natural asset base for tourism and the region straddles two Fáilte Ireland national strategies; the Wild Atlantic Way (WAW), which covers Donegal to Kerry and West Cork and Ireland's Ancient East (IAE), which incorporates Cork's many cultural attractions, which is intended to match and complement the WAW in terms of scale and ambition.

In the first instance, the SW region a great place to live. Its beauty its character and its uncongested nature put it among the greatest places in the world to live and to visit. This quality of life is the key to encouraging international business be it FDI, trade or tourism.

Metropolitan Cork City and its environs is the largest urban centre in the region accounting for some 43 per cent of the total regional population. It is Ireland's second city and acts as a strong gateway for the region, is well served from a transport perspective and will continue to be a driver of economic development in the region.

Connectivity and Access. A core strength of the region is the lack of infrastructural congestion, whether this is roads or water services. The connectivity of the region is strengthened and enhanced by being served by three international airports Cork and Kerry and Shannon. At the time of publishing, the state-owned Cork International Airport served 41 British and European scheduled destinations. There were over 190 flights each week to these 41 destinations during summer peak. Kerry Airport currently offers scheduled direct flights to Dublin, London-Stansted, London-Luton and Frankfurt-Hahn with additional flights to Alicante and Faro during the summer period.

Cork's economically viable and readily accessible sea port is a Tier 1 port of national significance. The Port of Cork is a key link to the economic success of the South West region. The Port of Cork Company has received planning permission from An Bord Pleanála for the redevelopment of Ringaskiddy in the lower harbour in June 2015. There is also significant capacity in Whitegate and Bantry Bay Harbour for oil storage.

Fenit Port and Marina located near Tralee in Kerry is a deep water port which caters for vessels up to 5,000 DWT (deadweight tonnage) and is used by exporting firms such as Liebherr Ltd. Foynes port on the Shannon Estuary caters for vessels of up to 60.000 DWT.

Energy. The SW region has a strong and growing presence in the energy sector and growing levels of collaboration between public and private sector through bodies such as Energy Cork. Around 25 per cent of all national energy needs are produced in the SW region. Cork is home to approximately 20% of Ireland’s electricity generating capacity, including 17% of the country’s installed wind power and 31% of Ireland’s oil products are supplied from the region and over 90% of Ireland’s strategic oil reserves are held in Cork.

The major energy industry actors in Cork, as well as academia and local government, have established Energy Cork, the energy industry cluster for the Cork region, as a result of Cork Chamber encouragement. Energy Cork members pursue job creation and economic development opportunities in the region.

Major electrical infrastructure exists in the regions and adjacent to the region in terms of large-scale fossil fuel and hydro power stations:

- Aghada: 959 MW;
- Tarbert 592 MW;
- Whitegate 442 MW;
- Marina 88 MW;
- Lee 27 MW;
- Moneypoint 855 MW; and
- Sealrock 161 MW.

Total capacity 3124 MW representing 31% of national capacity. This energy gives rise to 400 kV, 220 kV and a number of 110 kV circuits in the region.

Institutional Strengths. Initiatives such as the Cork Area Strategic Plan (CASP) demonstrate the regional capacity and capability to work collaboratively to harness central funding for the benefit of the entire region. CASP is a framework to enable Cork to become a leading European city region - globally competitive, socially inclusive and culturally enriched. The CASP covers an area determined by a journey time of about 45 minutes from Cork City, an area that has been defined as the Cork City-Region. It includes Cork City, the satellite towns of Middleton, Carrigtwohill, Carrigaline, Ballincollig and Blarney and the ring towns and rural hinterlands of Bandon, Macroom, Cobh, Mallow, Charleville, Kanturk, Fermoy, Michelstown, Youghal, Clonakilty, Bandon and Kinsale.

Property for enterprise. The region has a range of property assets available for business development and also additional investment planned by IDA in the region. Kerry Technology Park “co-located” with The Institute of Technology, Tralee (ITT), offers a unique model to cater for the entire life cycle of business. The Cork Science and Innovation Park (CSIP), planned on the western side of the city on lands adjacent to CIT, will be developed in partnership between UCC, CIT, landowners and Cork County Council.

Education and research assets. Third Level Education for the Region is provided by University College Cork (UCC), Cork Institute of Technology (CIT) and IT Tralee (ITT) who, combined, have 33,515 full and part time students enrolled providing yearly graduates across Business, Humanities, Engineering and Sciences as well as Art and Music.

The level of collaboration between the three HEIs in the regions is unparalleled in Ireland. CIT and IT Tralee are planning to merge and form the Munster Technological University (MTU) together they have completed three stages of a four-stage process; the projected timeline is for merger in 2016. CIT and UCC also operate a number of joint programmes, with joint delivery and joint awarding of degrees, in areas such as Architecture, Biomedical Science, and Art & Design Education.

Centres of research excellence include Tyndall National Institute, Alimentary Pharmabiotic Centre, the Governance Risk and Compliance Technology Centre, the European Centre for Clinical Trials in Rare Diseases (UCC), Nimbus Centre, CAPPA, Halpin Centre, MEDIC, Hincks Centre for Entrepreneurship Excellence (CIT), MaREI, Shannon ABC, Moorepark Animal & Grassland Research and Innovation Centre, the Crean Centre for Entrepreneurship and Enterprise Development and Irish Academy of Hospitality and Tourism (ITT).

There is further collaboration between the institutions in some research areas, with CAPPA maintaining a presence at Tyndall through the IPIC SFI Centre, for example.

In addition, CIT, UCC and the Irish Naval Service have formed a three-way partnership in IMERC (Irish Marine Energy Cluster), established to enable the partners to drive a range of initiatives in the maritime and marine energy space. UCC's Beaufort Laboratory, an integral part of the IMERC cluster, is located in Ringaskiddy and is home to UCC's marine renewable energy research, as well as the MaREI programme, funded by Science Foundation Ireland.

Moorepark Animal & Grassland Research and Innovation Centre, based in Fermoy, has played a vital role in the development of the Irish dairy industry since 1959. Since then it has been the focal point of Irish research into all aspects of dairy production and carries national responsibility for all aspects of dairy production research.

Opportunities

Tourism: As noted above the South West straddles two Fáilte Ireland tourism strategies. There is significant potential to further develop the WAW and Fáilte Ireland's research suggests Ireland's Ancient East has the potential to deliver an extra 600,000 overseas visitors to the region and increase visitor revenue by almost 25% to €950m in total by 2020. The Local Authorities in the region are also, in conjunction with Fáilte Ireland, Tourism Ireland and tourism stakeholders, developing Tourism Strategies and Action Plans which will set targets for growth, co-ordinated actions Tourism governance models. This will be completed by year end and will be the driving growth strategy for tourism in the region. Please refer to Section 6.2 below on Tourism.

Enterprise mix: As noted above a key strength of the region is in manufacturing and there is potential to further strengthen the growing the base of indigenous and FDI manufacturing investment in the region building on established clusters of Life Sciences, ICT, and Global Business Services and emerging opportunities in marine and energy related research. With abundant natural resources and intellectual capital and technical capabilities Cork and Kerry has a major competitive advantage and distinct opportunity to position itself as a region of leading capability in global agri-economy. In Kerry alone farming is worth over €400m to its economy. There are over 2,000 dairy farmers in the county producing 450 million litres of milk which represents approximately 9% of all milk production in Ireland. The European market is now unrestricted in terms of production which presents significant opportunities for growth for the dairy and food sector. Additionally there is opportunity for expansion globally in particular in China and South East Asia. As a region with critical mass across the agri-food and drinks spectrum and an excellent R&D capability in food science and technology the South West has a vital role to play and will be integral to Government's success in attaining the 'Harvest 2020' targets.

Innovation: The innovation system in the region is developing fast and the assets in the region provide potential on which to build. The Kerry Technology Park has been particularly successful in supporting entrepreneurship and there is a potential for further growth as it offers a unique model of support, collaboration & mini cluster development co-located with IT Tralee. Similar opportunities are possible for the CSIP.

The Synthetic Biology Accelerator Programme to be based in Cork city centre and supported by Cork City Council represents a major opportunity for the South West region to focus on, and attract, entrepreneurs building technologies in or around the field of Synthetic biology.

IT@cork, European Tech Cluster is a leading not-for-profit independent business organisation, representing the interests of the IT industry in Ireland. It is a unique blend of indigenous and international IT professionals, executives, multinationals, government leaders, public sector, academia, entrepreneurs, investors and the legal and financial professional services community joining together to drive thought leadership, collaboration and global strategic alliances.

Energy Cork is an industry-driven cluster 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 respective Economic Development Funds, *Energy Cork* was conceived by Cork Chamber with a view to building on the unique opportunities for the region to secure competitive advantage in the energy sector. *Energy Cork* is working towards establishing Cork as a national low-carbon vehicle hub, encouraging the use of electric vehicles (through the Drive4Zero initiative) and natural gas vehicles (NGVs) utilising compressed natural gas and renewable biogas in public and commercial transport fleets. *Energy Cork* also supports the promotion of and

development of the Energy Hub in Cork Harbour. Cork County Council have designated 388 Ha at Whitegate as suitable for use by energy industry.

Cork Health Hub, building on the APJ Health Innovation Hub. *UCC Health Demonstrator* which is actively pursuing proposals that can bring innovative solutions to health needs. The recently created Hospital Group HSE Region incorporating Tralee, Cork and Waterford offers further potential for collaboration. The decision on the National Health Hub is imminent and should be actively supported as a key driver of the regions attractiveness.

The *Hub for Construction Professionals* serves as a means for targeting new construction projects at home and abroad. It is located in Cork City where professionals can share low-cost, low risk affordable office space that includes common areas, canteen and meeting room. It was initially supported by Local Authorities and LEOs. Participants in this community get to network, collaborate, share knowledge and are better placed to bid for projects.

The global shift towards attraction to urban centres provides an opportunity to compete for mobile investment.

Property: The region is well placed in terms of potential industrial and office developments. The potential of the Ballylongford landbank in North Kerry has for a number of years been identified as a strategic zone for development in the areas of energy, maritime and data storage. Cork Docklands, comprising 400 acres of land to the east of the city centre on both banks of the River Lee, along with Ringaskiddy, Little Island, Cork Science and Innovation Park offer Strategic Employment locations. The proposed CSIP to be built between Ballincollig and Bishopstown in Cork also offers the potential to attract research and technology orientated companies to invest and develop operations in the region.

Cork Science and Innovation Park will provide a location for global best practice and facilitate the development of innovative processes and products. It is proposed to ultimately deliver in excess of 350,000 sq. m. of floor area over 60 ha. of land in a collaborative development involving Cork County Council, University College Cork, Cork Institute of Technology, commercial developers, landowners and state agencies. The development of the Science Park and the associated infrastructure project will comply with the 2011 CSIP Masterplan, which was adopted by Cork County Council in October 2011. A €50 million Event Centre will soon be under construction in Cork on a former brewery site in the city's medieval quarter. This Centre once completed will attract more visitors to the city.

Access: In relation to international access to the region, there is currently spare capacity at Cork International Airport with significant potential to add new routes and carriers as there is at Kerry Airport also.

Kinsale has led the way becoming the first town in Ireland to enjoy the benefits of car-pooling for its commuters to and from Cork. Further Smart Initiatives should be trialled in the region and proposals are being developed for example making Cork City and its commuter belt the car-pooling centre of Europe. Cork intends to become Ireland's first 'cashless city' after ambitious plans involving hundreds of stakeholders across the city were launched in November 2014. Going cashless is going to mean conducting all business electronically through phones, with users paying for food, drink, transport, and other transactions through a simple swipe and pay system.

The Diaspora. Diaspora from Cork and Kerry represent a significant asset and opportunity for the region. Pilot initiatives, such as those being launched in Kerry aimed at connecting with the county's diaspora represent significant opportunities for securing investment. Cork County Council is also acting in partnership with Connect Ireland in building the potential of the diaspora connections through active participation through the Public Participation Networks and further plans to utilise the Connect Ireland connector database as a means of targeting visitor and business tourism contacts for the region. The Cork Foundation is a new philanthropic fund to support new business

expansion, job creation initiatives and community strengthening programmes and is a model that offers further potential for development.

International Partnerships: Kerry has a Memorandum of Understanding (MOU) in place with Zhejiang since May 2013 which covers the areas of education, business and tourism. IT Tralee also has an MOU in place with Zhejiang University of Science and Technology (ZUST) in Hangzhou covering the areas of international education; applied co-operation and professional development of staff including exchange programmes.

Cork has been twinned with Shanghai since 2005 through Cork City Council. Cork is also a sister city of San Francisco. In September 2014 the Mayor of Cork County and the Governor of the Province of Jiangsu, China, signed a letter of intent to promote cooperation in the areas of Economic Development and Trade particularly in the SME sector, exchange of information and possibly interns to aid economy and trade, Education, and cultural issues and exchanges.

Cork also has concluded memoranda of co-operation with three large Chinese cities – Hangzhou, Wuxi and Shenzhen. All of these agreements have a focus on education, business and tourism. , As the largest business organisation in the Cork region, Cork Chamber has collaborated significantly with the City Council in helping to develop the business relationships between Cork and China. Cork Chamber first led a delegation to Shanghai and Hangzhou in 2006 and more recently led in September 2010. The Chamber has signed MOUs agreeing to promote trade and cooperation, with two Chambers of Commerce in Shanghai and recently signed an MOU with a Chamber of Commerce in Hangzhou. This relationship offers significant potential to link the South West region to Lower Yangtze River region in China. There are five Chinese companies operating in Cork.

Cork County signed a formal Sister County Agreement with Cook County-Chicago, Illinois in 2000, which was reviewed in 2005 and continues to promote Cork as a major business tourism destination and location for businesses in Mid West USA to consider as a European base. Cork County signed a Sister State agreement with the State of Maryland, USA in 2012 to foster interaction among entrepreneurs and business enterprises, promote investment and expand tourism, commerce and fair trade.

In 2007, IT@cork signed an MOU with the Illinois Information Technology Association (ITA) in association with Chicago-Cook Business Centre, Cook County, Illinois, Cork County Council and CORKBIC. The overall objectives of the Memorandum of Understanding are: *"To encourage and facilitate business relationships and networking activity between technology companies in the Greater Cork region and the Greater Cook County, Illinois region. This would include the exchange of best practice, building of relationships based on collaboration and trust in order to facilitate joint ventures and strategic alliances"*.

Value Proposition. The first version of the Cork Brand Book aims to clarify the Cork experience, offer and desired reputation – its strategic place brand. It sets out key messages and strengths for using in promoting Cork to industry, inward investors, international talent and students.

International Broadband Connectivity. A super-fast internet cable, linking the US to Europe, is due to land in Cork in early Q3 2015. The transatlantic subsea cable, called Project Express, will be the first modern fibre-optic cable connecting North America to Europe in more than 12 years. Operated by global telecoms provider Hibernia Networks, the 4,600km cable will provide a super-fast internet connection for companies, promising the lowest latency route from New York to London with about 60 milliseconds round-trip delay. Currently, most points of international connectivity are located in Dublin. The new Hibernia Express Project connection will provide direct international connectivity in the south of Ireland. As such it will be significant for regional development and will support not only the major MNCs in Cork but other businesses in the south.

Having a landing point in the south provides additional resilience and diversity in international connectivity for Ireland, reducing the risk of having a single point of failure in the network. It significantly increases the overall capacity on international links out of Ireland to North America, UK and on to Europe. Along with the Kelvin project in the north, it will support the establishment of multi-national companies which rely on low latency, high speed links overseas, in regional areas, rather than concentrating these in Dublin. For these reasons it will be a significant benefit for the continued attraction of foreign direct investment.

Following the acquisition of Whitegate refinery in Cork Harbour Whitegate it will be upgraded and linked directly to refining activities on the east coast of the US. As a result the refinery will have a new and strategic role as part of a major player in the oil industry.

Finally, Cork and Kerry are at the heart of Ireland's vibrant arts and culture scene – music, visual art, craft and design, theatre, poetry, dance, festivals, food, sport are all catered for – and thriving - in this region. This brings benefits not just for tourism, but also as a form of cultural knowledge, an enabler for cultural participation. CIT Crawford College of Art & Design and CIT Cork School of Music provide emerging artists and musicians; UCC through its School of Music and Drama and the Glucksman Gallery are also a key enabler in this space. These are additional advantages for companies in the region seeking to attract talent, in terms of access to quality cultural education for children. There is also strong public sector support for culture and the arts, through municipal museums and galleries, including the Crawford Gallery in Cork city, and the Siamsa Tire Theatre in Tralee. Both counties have very strong support for the arts through city and county arts offices.

4. Regional Leadership, Governance and Alignment of Strategic Planning

Towards Common Objectives – Growth & Jobs

A key challenge for the region is to restore the jobs lost in the recession and get back to sustainable full employment levels, with sectors and clusters that are internationally competitive.

In the context of international competition for trade, investment, tourism and talent, developing scale at European level is increasingly important and counties need to work together to operate as an effective and cohesive region so as to promote the South West as an internationally attractive location of scale. In this regard the Councils of Cork City, Cork County and Kerry are building on the already strong working relationships forged when preparing Regional Planning Guidelines for the South West, seeing potential to strengthen links further as part of the Atlantic Gateways Initiative which aims to improve linkages and develop an economic zone that will include Tralee/Killarney, Mallow and the Atlantic Gateway Cities of Galway, Limerick, Cork and Waterford.

The development of joint initiatives can contribute to a dynamic of transformation of the business environment and the development of a leadership position in a number of areas for the region. This requires co-ordination and collaboration at all levels, private sector and public sector, in terms of spatial and transport and land-use strategies, community and social development planning and enterprise support.

In response to economic and demographic growth expectations over the next 20 years, the Cork sub-region will need to adapt to compete in a rapidly changing international market. For this reason, Cork City Council and Cork County Council prepared CASP. The Cork Area Strategic Plan is a framework to enable the wider metropolitan area of Cork to become a leading globally competitive, socially inclusive and culturally enriched European city region - by attaining critical mass, integrating land uses and transport, making efficient use of investment in infrastructure and providing a high quality environment.

There is an opportunity for the model of CASP to be more widely used as an exemplar for the development of other key sub-regions within the South West, to include Kerry and along the Atlantic Corridor. The long standing strength of the Chambers' network and the potential to further strengthen collaboration among Chambers and other business representative organisations (such as IT@cork, Ibec sectoral federations, CEIA, the Irish Hotels Federation (IHF) and various Retail Associations) throughout the region also provide an important platform for collaboration between the public and private sectors over the coming period and to enable the effective implementation of the Action Plan process.

The Clustering Best Practice exemplified by IT@cork and Energy Cork should be extended to other sectors to strengthen enterprise and employment across the region. These industry Driven Clusters have the capability to build on the unique opportunities for the region to secure competitive advantage for their sectors and increase the job creation potential.

The land and marine-based Strategic Integrated Framework Plan for the Shannon Estuary, the first of its type to be developed in the country, has been completed by a multi-agency steering group comprising Clare County Council as lead authority, Limerick City and County Councils, Kerry County Council and Shannon Foynes Port Company. The Strategic Integrated Framework Plan (SIFP) for the Shannon Estuary is a very good example of inter-regional strategic planning, with all of the constituent local authorities giving the SIFP a statutory basis by incorporating same into their Development Plans.

Local Economic and Community Planning

The vision for Local Government, as set out in the Action Programme for Effective Local Government, ensures Local Government will be the main vehicle of governance and public service at a local level, supporting economic, social and community development, delivering efficient and good value services and represent citizens and local communities effectively and accountably.

The Local Government Reform Act 2014 provides for a strong role and involvement in economic development by the Local Authority within their county. Local Government has a central role in the oversight and planning of local economic and community development programmes and a critical element of this is the development of five year Local Economic and Community Plans (LECPs). This will align the economic and community objectives at a county level and importantly integrate to the regional and national Plans and priorities.

Involvement of local Government in Enterprise support and local and community development programmes through the LECP will provide an important local focus to give effect to this APJ for the South West region.

National Spatial Strategy

The National Planning Framework will be prepared in 2016 and will seek to build on the successes of the National Spatial Strategy to provide a strategic spatial policy context for balanced national and regional development over the next 20 years.

It will provide the over-arching framework to inform co-ordinated decision-making by relevant Government Departments and Agencies that must be followed through in subsidiary plans – as such its influence will range from nationally important projects that will contribute to the strategic profile of the State, to more local actions that provide vital supports to our communities.

In this regard the NPF will play a key enabling and co-ordinating role in the national effort to secure sustainable economic recovery by:

- Identify national priorities with regard to future employment growth and development;
- Distinguishing between the role of the larger cities in acting as major international players and regional towns in extending the influence of the cities; and
- Establishing a clear policy framework within which there will be a more dynamic participation by rural areas in overall regional development by re-emphasising the contribution from rural based enterprise in food, tourism, natural resources and innovation sectors.

Regional Cooperation

The challenge of delivering balanced regional growth and creating sustainable employment opportunities in an increasingly competitive global economy, together with wider considerations arising from the Public Sector Reform Agenda have resulted in the creation of a new Regional Tier of Local Government. On 1st of January 2015 three new NUTS II Regional Assemblies consisting of a total of 8 Strategic Planning Areas at the NUTS III level came into operation.

Fig 2. Ireland's Planning Policy Hierarchy 2016+



The new streamlined regional planning structures provide opportunities for increased co-operation over wider geographic areas (including at inter, intra and sub-regional levels as appropriate). In this regard, and to reflect the important contribution regional spatial planning will play in sustaining the national recovery and delivering balanced growth, the Regional Planning Guidelines will be replaced by new Regional Spatial & Economic Strategies (RSEs) in 2016. The Councils of the counties of Cork and Kerry and city of Cork will form a distinct Strategic Planning Area within the Southern RSEs.

Key considerations for the Southern RSEs will include identifying and promoting key priority projects for investment that will drive forecasted demographic and economic growth in a manner that maximises returns to the region from (1) the internationally important Cork City, County Metropolitan Cork and the Greater Cork Ring Strategic Planning Area, (2) supports the strategically important Tralee – Killarney axis and (3) maximises opportunities to develop dynamic rural-based communities.

In this context Cork City & County Councils and Kerry County Council will play a lead role in delivering balanced regional growth, by implementing individual but complimentary strategies and plans that operate at the local and sub-regional levels, within a coherent Regional policy framework, and in a manner that maximises returns from existing infrastructure and planned investment.

5. Collaboration and Building Business Networks

The South West region in general has a range of leadership bodies and organisations that work effectively to bring together public and private stakeholders. A key theme from the consultation with stakeholders was the potential to further build on these networks and extend effective collaboration across the South West Region to support exports and jobs growth.

Accessing markets and selling services internationally was identified as one of the areas where such collaboration could help. Brokered introductions play a crucial and impactful role in supporting companies to export and gain real sales leads. Providing such links to opportunities abroad together with information based on experience can serve to reduce market research times and accelerate establishment abroad - piggy backing on the established success of others.

The stakeholder consultations also proposed effective networking and harvesting of Diaspora and graduate alumni networks for talent and investment, discussion groups for business, strengthening of business networks to support further local engagement between business community and public bodies so as to enhance the business environment, greater engagement with the third level sector in the region so as to ensure availability of skills and graduates required by enterprise. There is great potential for the region to create a platform for leads to be generated in an organic way, to then be developed by relevant stakeholders, including in partnership with Connect Ireland

The continued development of links with other regions, including with Dublin were also seen as important to building the connectedness of the region, its knowledge base and awareness of potential funding opportunities from outside of the South West region to create jobs growth and require continued attention as part of the Action Plan. In addition, building links with the adjacent regions of the Mid-West and South-East offers further opportunities.

There are a number of already effective networks in operation in the region (or in parts of the region). Our objective is to:

- strengthen and leverage existing networks across the region and where appropriate build new sectoral networks of relevance;
- facilitate cross sectoral dialogue and idea generation around identifying potential growth opportunities arising from convergence;
- put in place a more systematic engagement between enterprise and HEIs across the region with a focus on identifying current and future demands (sectoral trends) coordinated skills supply and development, and increase relevant industry placement opportunities (to include SMEs);
- connect with international research communities and institutes through the involvement of Tyndall National Institute and the SFI Research Centres in EU H2020 funded research and other EU funding initiatives;
- strengthen connections with diaspora including post graduates in a more structured and systematic way; and
- develop a series of structures and mechanisms that promote and support engagement between business and the education and training sectors, including HEI's and ETB's to further enhance the regions ability to respond effectively and efficiently to current and emerging skills needs.

Actions

Building Business Networks

1	Develop and strengthen the Regional Chamber of Commerce Network in the South West to provide a cohesive approach to business support and development across counties Cork and Kerry.	Q4 2015	Chambers
2	Strengthen existing Ibec networks across the SW region by developing additional Ibec development and best practice networks in the region including in PharmaChem and medtech and food and drink sectors, together with Leadership Forums.	Ongoing	Ibec
3	Build the reputation of the South West region as an international centre of expertise, knowledge and collaboration for the ICT sector, strengthening the effective work to date in linking effectively the multinational, SME and research base in the region.	Q4 2015	IT@cork
4	Develop and promote existing networks across the region to take advantage of LEO EEN (Enterprise Europe Network) status to ensure we maximise the export opportunities that this now offers for small business across the South West region.	Q4 2015	EI, South West Local Authorities, LEOs, Chambers and other Business Representative Organisations
5	Establish an SME 'Advocates for Success' panel of local business leaders, entrepreneurs and enterprise role models that will champion entrepreneurship in the SW region.	Q4 2015	Chambers, EI, HEIs, LEOs,
6	Develop a Creative & Design Forum for the Region, based around LEO/LA founded successful Cork & Kerry Food Forum Model already established supporting over 400 food producers in the region.	Q4 2015	Industry, South West Local Authorities, LEOs, DCCoI
7	Strengthen public and private collaboration in existing industry cluster groups in the Region, including Energy Cork, IT@Cork, CEIA and IMERC	Q4 2015	Industry, Energy Cork, IT@Cork, IMERC, CEIA
8	Provide a co-ordinated support mechanism and linkage to assist existing and new rural/community enterprise groups	Q4 2015	South West Local Authorities, LEOs

6. Building Sectoral Opportunities, Clusters and Ecosystems

Clustering and Competitive Ecosystems

The South West is renowned as a national cluster for food and drink, ICT and life sciences, with a strong record for example in the manufacture of complex pharmaceutical and medical device products. The region has a range of assets and strengths on which to build a sustainable enterprise mix for the future, based on talent, competitiveness, innovation and success in international markets. The Government's success in securing of regional aid for Kerry in 2013 will assist in improving the attractiveness of Kerry's offering for FDI.

Currently, IDA positions the South West as offering a strong cluster in a number of areas including Pharmaceuticals and Medical Technologies (Pfizer, Novartis, GSK, Janssen, AbbVie, Eli Lilly, Gilead, PepsiCo, GE, Stryker, Gilead, Alcon, DePuy-Synthes and Astellas among others). The success of the South West for attracting life sciences has seen the growth in associated support services such as engineering consultants and project managers, facilities management, clean room providers, specialist recruitment agencies, tailored educational courses, etc. This specialisation of services has increased the attractiveness of the cluster. IDA also has a range of Business and technology Parks and utility-rich strategic sites available for large scale development in the region which complement the private sector business parks, offices and industrial buildings.

The Region also has a significant cluster of technology companies such as Apple, Dell, Intel Security, Trend Micro, EMC, Tyco, VMware, among others. These global names have not alone located in the South West but have reinvested in the area, offering confidence to new entrants. The cluster of companies has led to the growth in suitably qualified individuals, experienced in working with multi-national corporations. The availability of new property solutions with a campus style design has added to the attractiveness of the area.

Employment in Internationally Traded Services (which incorporates activities such as customer and technical support, sales and marketing, finance, supply chain management, legal and human resource activities) has grown significantly over the past decade both as extensions to existing manufacturing operations as well as attracting new services companies to the region. This is an area that is particularly strong among both IDA and Enterprise Ireland client companies in the region and will continue to be an area of opportunities in the years ahead so long as the region can supply the necessary skills to companies and that the competitiveness remains relative to other competing locations.

There are also a wide mix of Engineering, Industrial and other manufacturing companies which are noted for their presence in the region over many decades and for the fact that they are located outside the larger urban area of Cork city. These companies are important contributors to the regional economy providing valuable employment and include companies such as Liebherr in Killarney, Kostal in Mallow, Alps Electric in Millstreet, Sanmina in Fermoy, Borg Warner Beru Systems in Tralee, Rowa in Bantry, Tournier in Macroom Astellas in Killorglin and Listal in Listowel.

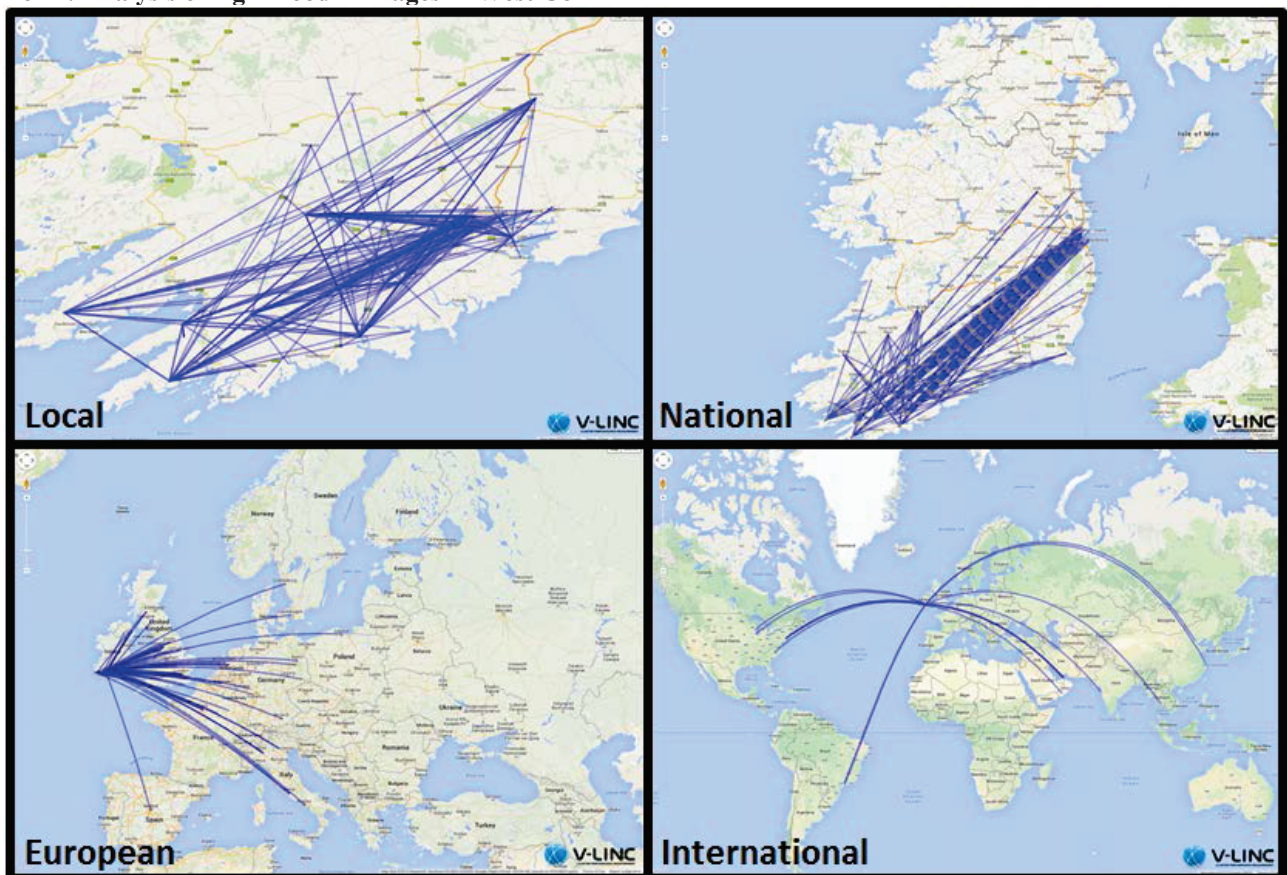
The Region also lends itself to strong research capability in ICT Technology and the agri-food and beverage sector. The agri-food sector is particularly strong in the South West and a demonstration project in this sector is proposed below, encompassing, agri-food and drink, agri-tech and agri-tourism.

A new cluster is emerging in the region based around the energy, marine and renewable technologies. The development of the Irish Maritime and Energy Resource Cluster (IMERC), which is

a vehicle established by UCC, CIT and the Irish Naval Service, will be a strong magnet of attraction for the South West. MAREI and NMCI, will harness and integrate diverse research and industry expertise through the development of the innovative cluster which incorporates the Beaufort Research Laboratory (UCC), The National Maritime College of Ireland (NMCI, CIT) and the Naval Service of Ireland. In addition, the International Energy Research Centre (IERC) - an industry led research collaboration hosted in Tyndall National Institute is focused on intelligent energy management solutions. Energy Cork is an example of an industry-driven cluster 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 respective Economic Development Funds, Energy Cork was conceived by Cork Chamber with a view to building on the unique opportunities for the region to secure competitive advantage in the energy sector. The South West region is already an established base for Renewable energy infrastructure, particularly in Wind.

Through linkages between SMEs/MNCs, academia and research centres, more collaborative benefits can be brought to job creation efforts through increased trade, innovation and research. There is a strong base of research in the region that can be applied to underpin the development and growth of the thematic clusters in the region to foster innovation, create employment opportunities and economic growth. The process of cluster development may also identify new innovative cluster opportunities for the region, such as building on the expertise in the region in compliance and regulation for the pharmaceutical, medical technologies and electronics sector, an area where there may be an opportunity to develop the South West as a centre of excellence. Existing cluster research underway in CIT on connections and levels of collaboration at industry sector level through the EU funded V-LINC project can provide an important input to the development of ecosystems in the South West Region. Box 1 illustrates the linkages for the agri-food sector in West Cork.

Box 1. Analysis of Agri-Food Linkages in West Cork



Source: CIT report for Cork County Council and West Cork Development Partnership
<http://www.corkcoco.ie/co/pdf/307756212.pdf>.

The progression of the Cork Science and Innovation Park (CSIP) at Curraheen will be a significant regional and national asset upon which to further build on cluster development. Similarly, the Kerry Technology Park (KTP) in Tralee offers a valuable resource which will continue to be developed as a location for enterprise and employment growth.

Leadership by enterprise is essential to the success of clusters in sectors where the region has competitive advantage. The impact metrics for cluster teams should be clearly set out, including keeping as much of a product/services supply chain in the region. Developing such a cluster in specific strategic segments of the economy will bring FDI to the region and facilitate growth of SMEs indigenous business in the cluster. The link with HEIs in the cluster will enable a fast response to the skills demanded by the HEIs.

Startups have a critical role to play in Ireland in terms of job creation and economic development. High Potential Start Ups (HPSUs) have the potential to grow rapidly internationally thereby creating significant jobs and innovation in Ireland. It is critical to understand how HPSUs plug into the local ecosystem to ensure regional and national policy can provide the supports required to help such firms develop, scale and expand in the South West region. The South West can play its part through creating a fertile ecosystem that will attract startups who want rapid growth in their sector.

6.1 Agri-Food and Drink Sector

The South West Region has distinct competitive advantages in the agri-food and drinks sector. It is the largest indigenous industry in the region and is expanding rapidly. Overall agri-food exports nationally increased to a record €11.3 billion in 2014. 64% of Ireland's milk production is from Munster while 26% of Ireland's total milk production is from County Cork.

The South West region has a long history of development in the Artisan Food sector, indeed well over half of all Artisan Food producers in the country are located in Cork and Kerry. The Artisan and Speciality sector has long been a priority for the Local Enterprise Offices in the region. Its further development forms an important objective in the strategic plans of the LEOs and substantial resources have been committed to developing the sector. There have been many successes that are now household names, who received their initial support from the LEOs (formerly CEBs). Some of these include Irish Yoghurts, Glenilen, West Cork Distillers, Ballymaloe Relish and Green Saffron, while there are many more supplying both national and international markets. These companies provide substantial employment, particularly in the rural parts of the region and many have real potential for growth.

The LEOs run a wide range of Food Development programmes, ranging from Start Your Own Food Business to the advanced Food Academy Programme in conjunction with An Bord Bia and Supervalu. Over 150 producers have gone through the Food Academy Programme to date and these have received listings in Supervalu stores as well as financial and other supports from the LEOs. Encouraging food companies to export has been a priority for the LEOs and a strong relationship with Bord Bia has developed to pursue this goal.

The Cork Kerry Food Forum, developed from the Cork Food Forum is now an annual event bringing together the LEOs, Local Authorities, Bord Bia, Musgraves and buyers from across the country to an industry and public event that publicises the quality and diversity of food production in the South West. The Food Forum attracts wide interest and provides substantial opportunities for smaller producers from the South West Region.

Significant investment on-farm and in processing capacity and in research is now underway to exploit the full potential of the post quota environment in place from early 2015. Some notable investments include Dairygold's €117 million investment announced in 2014 in new processing capacity in Mallow and Mitchelstown, County Cork, to serve the region. Both investments are supported by the Department of Jobs, Enterprise and Innovation through Enterprise Ireland. Dairygold's 3,000 milk suppliers have forecast to increase annual milk production by up to 60% by 2020.

A €10 million investment has been agreed by Teagasc and the dairy industry shareholders for the expansion of the Moorepark Technology Ltd (MTL) pilot plant facility in the Moorepark complex. In addition, Teagasc, the FBD Trust and the Department of Agriculture, Food and the Marine, has invested over €4.5 million in a new Innovation Centre for Grassland and Dairying at the Moorepark Campus in Fermoy, County Cork. These investments by Government and industry will position Ireland as a world leader in dairy innovation and will help to maximise the long term growth opportunities created by the planned for increase in the national milk pool.

The key focus now is to ensure that the region develops the enterprise base, products and services that can maximise the value-added from the increased production at farm level, so as to drive exports and sustainable jobs over the long term. The Department of Agriculture, Food and Marine is currently developing a successor strategy to Food Harvest 2020 and this will set out a roadmap for harnessing the full potential of the sector for economic and social benefit over the coming years.

As noted above in the section on clusters there is significant potential to develop an international cluster of scale in the region, combining strengths in agri-food and drink, tourism and agri-related

engineering and technology solutions. Work is already well advanced on the Food Innovation Hub on the Teagasc Moorepark campus. Its principal objective is to create a business innovation network involving dairy companies, Moorepark Technology Limited, research institutes, incubators and public-private partnership based R&D programmes with a focus on food, health and nutrition. Uniquely ITT is the only third level institution in the country delivering apprenticeship programmes in agricultural engineering and also delivers degree programmes in agricultural engineering and a forthcoming programme in agricultural mechanisation. CIT offers Bachelor of Business programmes in Agriculture and Horticulture with strong linkages to Teagasc Clonakilty Agricultural College. Teagasc has world leading research, advisory and education activities in the SW region and UCC is host to a number of leading food and health related scientific research centres. UCC's Alimentary Pharmabiotic Centre, in which Teagasc is a major partner, is ranked 2nd in the world for research in its field. All of these institutions are internationally networked with leading institutions ranging from the US, New Zealand and China.

Tyndall National Institute is active in a partnership with Teagasc using world class sensor capabilities to develop smart agrifoods programmes. The use of ICT in food production, spearheaded by Teagasc in association with university partners, has the potential for improved quality, lower production costs and security and traceability, all elements which support a strong made in Ireland brand.

The Environmental Research Institute is UCC's flagship Institute for energy, environmental and marine research. It has over 300 researchers and 100 live research projects at any one time. Given this capacity and range of research the Institute can contribute to many of the goals within Energy, Green Economy and Marine particularly in the areas of circular economy, biogas and natural resources. Its Sustainable Agriculture, Food & Forestry group is committed to using its multidisciplinary expertise to offer more rounded solutions to the challenges facing the Irish and global agricultural system. The key objectives are to further strengthen this critical mass of multi-disciplinary research expertise, to leverage this combined expertise as part of a holistic "package" when applying for research funding, and to secure additional field trial & laboratory facilities for agricultural, agro-ecological and bioenergy studies. In doing so the ERI will further underpin, sustain and promote employment and job creation in the agri-food sector in the region and nationally.

In relation to the link to tourism the consultations identified the need to increase profile of Cork and Kerry regional food products for export markets, to further develop local networks and primary producer groups and optimise the opportunities for cross-selling to tourism and accommodation representative groups. Existing initiatives such as Kerry County Council co-ordinating with Taste Kerry can be further built on.

A strategic need exists to develop an industry-led, demand driven, collaborative, strategic and value creating AgriMunster Cluster to build on the significant opportunities and unique strengths of the agri-cluster in Munster. This collaborative approach was identified in the Cork Chamber's 2014 report, '*Cork's Agri-Food and Drinks Opportunities*' and the FDII report, '*A 10 Year Vision for Prepared Consumer Foods*'.

Focusing on the Golden Vale, such an initiative should be advanced through private and public sector collaboration, including the Southern Education Cluster of ITT, CIT, WIT, Carlow ITT and UCC. Other national and international partners should also be considered as part of this consortium. The objective would be an approach that is nationally and internationally recognised as a successful model to increase innovation, productivity, exports and jobs is aligned with European and National policies.

To advance this proposition, the next steps are for the key stakeholders to combine their efforts so as to identify the key opportunity areas and to identify the steps needed to:

- Embed Munster's Positioning as a Competitive Knowledge Economy & Leading Global Innovator in Agri R & D;

- Ensure Munster's Positioning as a Leading Provider of Cutting-Edge Agri-Talent;
- Position Munster as the Optimum Environment for Starting & Growing Agri-Businesses;
- Prime the region for long-term agri-growth by ensuring quality foundations and prime conditions through consensual regional strategic plans; and,
- Promote the region as a world-class food region through coordinated marketing campaigns.

Seafood

The Irish seafood sector is an indigenous industry that makes a significant contribution to the national economy in terms of output, employment and exports. The total value of seafood output in 2014 is estimated by BIM to be €850 million. Approximately 11,000 people are employed in the sector, mostly in coastal communities. Of these more than 3,000 are employed in the south-west region. In addition to fishing, fish-farming and seafood processing, the sector also supports ancillary industries including net making, vessel repair, transport, refrigeration and other services.

Because the seafood industry is widely dispersed around the coastline, it plays a key role in the sustainable development of the economic and social fabric of many coastal communities. Castletownbere, for example, is one of Ireland's premier fishing ports and supports over 150 fishing boats, along with local aquaculture fish-farming and significant onshore processing. A recent report by BIM demonstrates that more than 700 people in Castletownbere are employed either directly or indirectly in the seafood sector. Other local fishing ports also make a significant local and national contribution to jobs and enterprise in the region. These include Dingle, Union Hall, Baltimore, Skull, and Valentia along with numerous smaller landing places.

The opportunities for growth within the seafood sector are significant. A recent report by the UN's Food and Agriculture Organisation estimates that within 15 years the global demand for seafood will have increased by more than 40 million tonnes annually. Given that many fish stocks are already fished to maximum sustainable yield much of this new seafood will be farmed; Ireland and the south-west in particular are ideally located to capitalise on this expansion. Likewise the ports of the south-west of Ireland are ideally located close to the rich fishing grounds of the Celtic Sea making them an ideal landing place for non-Irish and Irish fishing vessels alike. Together these two factors, additional landings to local ports and increased aquaculture, offer significant potential to expand both the raw material base and the degree of value added to this raw material. Alongside this there are other new avenues for growth including SMART Nutrients and other forms of marine biotechnology.

It is clear that if we are to capitalise fully on these opportunities it will be necessary to address some legacy issues. These include industry fragmentation, poor continuity of supply, over reliance on commodity trading, an underdeveloped aquaculture sector and the need for significant upskilling within the processing sector. These are all factors that currently impact adversely on the profitability of the sector.

Thus, the focus over the coming years will be on i) expanding the raw material supply base, ii) enhancing the industry's scale, iii) increasing competitiveness, iv) developing new skills and iv) promoting the development of added value seafood products. Ireland's €241m Seafood Development Programme 2014-2020, which the European Commission is expected to adopt later in 2015, will provide measures to address many of these shortcomings. Funded through the European Fisheries Fund (EFF), Ireland's Seafood Development Programme along with significant private sector investment is ideally positioned to drive the substantial development envisaged for the wild fisheries, aquaculture and processing sectors both nationally and in the south-west.

In addition to the general fund, Axis 4 of the EFF also provides grant aid to sustainably develop and improve the quality of life in fisheries areas with particular consideration of the socio-economic impact of the Common Fisheries Policy. It is intended that the south-west will be serviced by two such 'fisheries local action groups' (FLAGs); one each in counties Cork and Kerry. With a membership reflecting the diverse interest of fishery dependent communities, these fisheries local action groups will facilitate change and seek to leverage the benefits of multi-sectoral collaboration and decision-making. Most importantly the FLAGs will, like other community led local development groups make have specific funds at their disposal for local projects. As such they are uniquely placed to assist with further development of the seafood sector in the South West.

Actions

Agri-Food and Drink			
9	Evaluate the efficacy of establishing a National Agri-Tech centre of excellence in the South West. This centre of excellence would have a particular focus on technology across the agri-sector, building on ITT's and MTU's leadership in mechatronics, RFID and agricultural technology research and education.	Q4 2015	ITT, CIT, Teagasc, UCC, EI, other national and international HEIS, Teagasc, APC and industry representatives
10	Enterprise Ireland will target food companies in the South West to scale, innovate and develop international markets in line with National Policy.	Q4 2015	EI
11	Consider and progress the development of an Agri-Cluster concept for the region, building on the unique strengths and opportunities in the region in the areas of Agri Food & Drinks, Agri-Tech and Agri-Tourism, to develop the productivity, innovation, networking and job creation in these sectors in the SW.	Q4 2016	Industry-Led, UCC, DAFM, Teagasc, CIT-ITT-MTU, EI, LEOs, ÚnaG, Chambers, Prepared Consumer Foods
12	In line with national policy, promote the key strengths of the region as a food and beverage producer through co-ordinated marketing campaigns by key subsectors in the South West region,	Q4 2015	Industry, Chambers, South West Local Authorities
13	Develop co-ordinated campaigns to push locally based product	Q4 2015	Bord Bia, DAFM
14	Optimise the linkage with tourism for attracting visitors to the region for food and beverage related activities.	Q4 2015	DAFM, industry, DTTAS, Fáilte Ireland Bord Bia, Chambers, HEIs, South West Local Authorities, EI
15	Encourage collaboration between small manufacturing companies and larger agri-food companies for distribution and market access.	Q4 2015	Bord Bia, Industry, Business representative bodies, EI

16	Create a business innovation network in the region involving dairy companies, Moorepark Technology, research institutes, incubators and small businesses focusing on food, health and nutrition and consider how best to meet the future innovation capacity needs of the sector as part of the successor to Harvest 2020.	Q4 2015	Teagasc, EI, South West Local Authorities, LEOs, DAFM
17	Progress the implementation of the Cork and Kerry Food Strategies developed by LA's and LEO's and build on and support the work of the Food Co-Ordinator position.	Q3 2015	South West Local Authorities, Business representative bodies
18	Support the further development of the Cork and Kerry international food event promotions and presence	Q2 2016	Bord Bia, EI, LEOs
19	Support the further development of the "Taste Cork" and "Taste Kerry" brands as key initiatives which have the potential to underpin significant internationalisation of the regions food SME's.	Q4 2015	LEOs
20	Develop a world class food research programme to support a doubling in food and agriculture growth for the region by 2025.	Q2 2017	UCC
21	Ibec to examine how best the whiskey industry might deliver its growth potential and deliver jobs to the region.	Q4 2015	Ibec, EI
22	Build on the successful initiatives of LAs and LEO's in the region in supporting indigenous food and beverage SME's in accessing international markets through their attendance and participation at international food trade events.	Q4 2015	Bord Bia, LEOs
23	Údarás na Gaeltachta will develop 6 units to food standard in Daingean Uí Chúis to provide accommodation for startups in the food sector.	Q4 2016	ÚnaG
24	Develop effective measures to attract additional landings into ports in the south west and continue to invest significantly in necessary infrastructure at the Fishery Harbour Centres in the region.	Q1 2016	BIM, DAFM, SFPA, Industry
25	Develop a national strategy to deliver scale in the key seafood sectors, including food ingredients, while also including elements to upskill personnel across the sector in the key areas.	Q2 2016	BIM, EI, Industry, DAFM, ÚnaG
26	In line with the new 2025 agri-food strategy, develop a national strategic plan with practical and implementable actions to significantly increase the quantity of seafood added value across all main species groups. The aim will be to reduce the level of national produce sold in commodity form from 70% to below 50%.	Q1 2016	BIM, EI, Industry, Bord Bia, DAFM

27	Improve the environmental sustainability of the seafood sector, including improved gear selectivity, replenishment of depleted inshore stocks by the use of aquaculture techniques.	Q4 2016	BIM, Bord Bia, Industry
28	Work to ensure that to the greatest extent possible, 100% of all seafood exports in the South West region will be verified Origin Green by 2016.	Q4 2015	BIM, Bord Bia
29	Run SeaFest festival which showcases Ireland's abundant maritime resources.	Q3 2015	DAFM
30	To ensure a good quality pipeline of food entrepreneurs, run pre Food Works clinics in the region in 2015 and 2016.	Q2 2016	EI, Bord Bia, Teagasc
31	Work with retailers to increase shelf space for local produce.	Ongoing	Bord Bia
32	Bord Bia to work with LEOs to assist South West food and drink companies be Included in this year's Tesco Taste buds programme.	Q4 2015	Bord Bia, LEOs
33	Using the Cork English Market as a good template, South West Local Authorities to consider replicating this model in other parts of the region.	Q4 2015	South West Local Authorities

6.2 Tourism

Tourism is Ireland's largest employer, with up to 11% of all jobs in the tourism and hospitality centre. Tourism Value Added (GVA) exceeds any major industry in Ireland with the exception of pharmaceuticals and domestic Irish tourists spend more than our foreign visitors, not the other way around. As of 2005, the value of tourism to Cork City is €317m and 2,325 jobs (€236.6m and 1,655 jobs directly) and to the hinterland - €87.3m and 639 jobs. In 2012, there were 1,228,000 visitors to Cork, the second largest in the country but less than half of Dublin's total. €399m was spent by those visitors in 2012. Every 1 million in tourism revenue supports 55 jobs in that sector. Every 1,000 extra tourists support 18 jobs in the industry and expenditure on food and drink makes it Ireland's 4th biggest industry in terms of GVA. The overall contribution of food tourism to Ireland in 2012 was €2,451.8m and 56,200 jobs. The projections of 2022 for the same sector are €3,934m and 89,900 jobs. Tourism is labour intensive; it operates 24 hours a day, 7 days a week. It also offers work opportunities for the young, casual and part-time worker and it supports and grows other sectors – transport, construction, agriculture and retail.

The Government's new Tourism Policy Statement entitled People, Place and Policy – Growing Tourism to 2025 sets out a series of policy objectives to be achieved in order to deliver, by 2025. The headline targets are to increase to €5 billion overseas visitor revenue, to grow total employment by 50,000 to 250,000, and to achieve ten million overseas visitors. Applying these targets to the SW region illustrates the potential to grow overseas tourism visitors to over 2.6 million from 1.86 million in 2013 and to grow revenue from overseas visitors to over €920m from €615m in 2013.

The South West is one of the leading locations and attractions for overseas visitors in the country and is well positioned to contribute to the Government's overall ambitions and targets for the sector over the next ten years. In 2013, 21 per cent of overseas holidaymakers to Ireland visited the South West region, the highest share after Dublin and the region has 19% of total serviced accommodation capacity in the country. The source markets for overseas visitors are broadly based with 35 per cent from mainland Europe, 30 per cent from Britain and 27% from North America. Favourable exchange rates should boost the perceived competitiveness of the region over the coming months. Seasonality remains an issue for the region however, with 68% of visits in the April to September period, compared with about 60% in Dublin and the South-East regions.

Cork and Kerry combined have a range of world-famous attractions and the continued investments over recent years have added to the competitiveness of the region internationally for tourist. While seasonality, access, visitor experience and price remain key considerations, the consultations with stakeholders identified a range of further initiatives that could assist in driving the sector forward and realising greater employment and growth potential for the region.

Tourism is particularly critical to the Kerry economy with some 10,000 registered bedrooms and one in four jobs in Kerry being in tourism.

Because of the importance of tourism to both Kerry and Cork (City and County), all three local authorities are currently leading out on Tourism Development Strategies – one for Cork and one for Kerry. These strategies are being developed with Fáilte Ireland and key local partners, agencies and stakeholders and will involve a process of local consultation.

Cork City Councils Tourism Strategy 2012-2015 initiated a number of important proposals with significant implications for employment. Elizabeth Fort was acquired by the Council in 2014 and an Interpretative Centre, costing in the region of €6m, is proposed for the Fort. This should bring employment opportunities during the construction and fit out phase and the management and operation of the Fort will also create new jobs. The Council is currently considering proposals in relation to the development of a National Diaspora Centre in Cork City. The projected cost of the NDC is in the region of €30m, with consequent opportunities during construction and for the long term management and administration of the facility. There are also proposals to mount the CEOL

exhibition, to establish the Nightmare Realm on a permanent basis in the City and to create a Little Museum of Cork attraction in the City Centre. The city's now well established Lee Sessions, which provides employment to traditional musicians is set to expand further in 2016 and 2017. The overall suite of initiatives is contributing in part to a demonstrable growth in visitor numbers to the city (9.7% in 2014 alone). This welcomed growth has obvious knock-on effects for the stability of existing jobs and the creation of new job opportunities and most especially in the hospitality sector but also in the transport and food sectors. The announcement of Ireland's Ancient East proposal by Fáilte Ireland and Fáilte's recent initiative in relation to a joint tourism strategy for Cork City and County promises significant future growth opportunities within this sector

At an overall level, the need was identified for greater strategic cohesion and clear KPIs for the two counties to grow jobs by increasing visitor numbers (particularly outside the peak season), revenue, bed night occupancy, in line with the priorities of Fáilte Ireland, as the National Tourism Development Authority. Sustaining communities through tourism employment is a key tourism objective, demonstrated by initiatives such as Fáilte Ireland's *Wild Atlantic Way* and *Ireland's Ancient East* along with the emerging local authority led tourism strategies under development for both Cork (City & County) and Kerry. Building on the success of how both Cork Convention Bureau and Kerry Convention Bureau's work with Fáilte Ireland to increase business tourism revenue and capitalising on the potential of water based tourism, international cruise and learning tourism and opportunities to grow jobs in the area of training and educations were all identified as particular drivers of success for the region.

The further development of **the Wild Atlantic Way**, from Cork City as a Gateway, through to Kinsale & West Cork and Kerry, is seen as a means of extending the employment period and move more tourism employees from part-time to full-time positions, thereby creating more sustainable jobs. The consultations also identified further potential for entrepreneurship and business development along the *Wild Atlantic Way*, providing quality experiences and services to visitors and enabling communities grow jobs locally. The region also has potential to promote year-round eco-tourism and education and research activities as part of the Wild Atlantic Way.

Ireland's Ancient East is a new destination brand developed by Fáilte Ireland to present the South, East regions of Ireland to an overseas market in a new way, to motivate them to visit; increasing and spreading visitor numbers and revenue. The brand will draw on and further develop a range of rich story-based culture & heritage experiences across Cork; increasing visitor dwell-time, spend and providing increased job creation opportunities,

There are opportunities for the region to establish a leadership position in hospitality **education and training** and to attract international students to study hospitality in Ireland by piloting a number of initiatives that could bring together some of the expertise in UCC, CIT and ITT. These opportunities would move beyond hospitality to engage with the experts in biological sciences, earth sciences, environmental sciences and also archaeology, history, music, folklore and culture. A key requirement, as with other sector is to optimise the use of ICTs in the tourism and hospitality industry so as to grow market share and jobs in the region.

Water based tourism experiences are seen as an area of growth potential for the South West in terms of the numbers of business and people employed. Developing and presenting market-driven, motivating water-based visitor experiences from kayaking to boat-touring, is central to delivering the Wild Atlantic Way brand promise and to Fáilte Ireland's development plan for the Wild Atlantic Way; and presents a compelling competitive advantage for the SW region. Significant work has been carried out by local authorities to map and enhance the product available in the area. Recent research conducted by Fáilte Ireland also points to market potential for more flexible sailing experiences such as chartered services, which plays to the strengths of the SW region.

CIT has recently received funding for a project valued at €1.26 million to develop a coordinated yacht cruising route, stretching around the coastline of the Northern Peripheral and Arctic region. The project entitled "Cruising Oceans on Latitudes above 51 ° North " - The " COOL Route", was recently approved by the NPA Interreg Programme and will research all of the logistical, business and marketing planning for the route, which will support other complimentary maritime and shore based tourism initiatives in all of the intervening regions along the route. Partners and in the COOL Route Project are CIT, Donegal County Council, Glasgow Caledonian University, Royal Cork Yacht Club, Derry City Council, Torshavn Port Authority, Blues Seas Marinas, Western Norway Research Institute. Associate partners and other project informal participants include the Irish Cruising Club, Donegal Tourism, Sail Scotland and the Irish Sailing Association along with a wide range of Local Authority, Local Development, Tourism and Sailing interests.

Cork ETB, through its outdoor pursuit's programmes in Kinsale College of Further Education, two Outdoor Education Centres in Kinsale and Schull, has been developing and delivering programmes aimed specifically at the active tourism sector. The linking of these programmes to the wider opportunities presented by the WAW provides a significant area for development.

Kerry ETB runs a very successful Outdoor Activity Instructor Traineeship based at Capanalea Outdoor Education and Training Centre in South Kerry and is developing new programmes in the area of Extreme Sports Tourism. The Kerry ETB Training Centre delivers a Surf Instructor and Beach Life Guard course to service the many Blue Flag beaches in the county. New courses in Tour Guiding courses have recently been added to Kerry ETB's extensive suite of Tourism related courses in order to support local businesses capitalise on new opportunities presented by the Wild Atlantic Way.

The South West Region due to its rugged coastline and extensive peninsular structure accounts for a major proportion of the country's coastline. This presents major opportunities for the development of coastal activities especially in the leisure and tourism areas. In 2008 Cork County Council and the Coastal and Marine Research Centre (CMRC), UCC, produced *A Marine Leisure Infrastructure Strategy for West Cork*, covering the coast from the Kerry border to Courtmacsherry (700km). In 2010, they completed the picture, with the South Cork Strategy covering another 500km of coastal inlets, bays, beaches and harbours, from Timoleague to Youghal. This involved auditing the coastal infrastructure and assessing the current offering in relation to tourism and leisure. Cork County Council, Cork City Council and Fáilte Ireland have established a Tourism Strategy Group to develop a vision and action plan to give cohesive direction to the future growth of Cork Tourism. The role of Cork County and City Councils as leaders in the development of Corks tourism product is recognised in national policy for Local Government in Tourism expansion.

The SW region Local Authorities are major actors in the provision of Tourism infrastructure. Cork County Council owns and operates attractions of Spike Island and Camden for Meagher in Cork Harbour, has purchased Mallow Castle with a view to developing a visitor attraction over time, Cork City owns and operates Elizabeth Fort and Blackrock castle among other sites. In addition the City and County operate extensive programmes of events supports throughout the tourist season. The Cork Councils recently cooperated on the development of a proposal for a National Diaspora Centre in Cork.

County Kerry has been welcoming visitors for generations. The County can boast some of Ireland's most iconic scenery including the world renowned Lakes of Killarney, Irelands highest mountains, the awe inspiring landscapes of the Beara, Iveragh and Dingle peninsulas and the rich pasturelands and sandy beaches of North Kerry. It has the most developed tourism industry with some 10,000 registered bedrooms, international festivals and events and vibrant eco- tourism, marine and activity tourism sectors.

The tourism sector provides one in four jobs in Kerry and it has been recognised that with the further development of the Wild Atlantic Way by Fáilte Ireland and the greenways in North and

South Kerry, there is a further potential for job creation. Kerry County Council in cooperation with the Destination Kerry Forum has commenced the drafting of a Tourism Strategy for the County and public consultation is underway at present. It is anticipated that the Strategy will be adopted by Council, by year end. A key objective is to attract new students (Irish and international) to the region and to provide specific tailored continuous professional development for this sector. A key requirement, as with other sectors, is to optimise the use of ICT in the tourism and hospitality industry and in the provision of Continuing Professional Development (CPD) in order to stimulate innovation, comma, grow market share and ultimately jobs in the region.

The Irish Academy of Hospitality and Tourism at the IT Tralee is a dedicated facility which houses an experience applied research community. It is involved in three pillars of activity: international collaboration; applied research and continuous professional development.

Kerry ETB has recently developed a new training and Production Professional Kitchen to support the development of skills in the culinary arts and is running courses in Tralee and Dingle. The ETB is also involved in the new Hospitality Career Traineeship being piloted by SOLAS that will address skill gaps in the hotel sector, as well as the proposal for a new Apprenticeship to train Commis Chefs. Kerry ETBs involvement in the Tourism Strategy for the County has led to new provision in Business and Tourism courses at NFQ levels 5 and 6 in South Kerry to support individuals and communities on the Ring of Kerry.

Cork ETB has a dedicated Hospitality and Tourism facility located within Cork City. This provides significant scope for further development of initial and ongoing training programmes for the sector, in collaboration with CIT and ITT.

Much of the tourism product in the region is rural in nature and has a short season. Cork County Council participated in an EU funded Cooperatives of Employment and Services in Rural areas (CesR) project from 2012-2014 aimed at developing measures that could support employment creation in rural areas, particularly in self catering accommodation sector. The outputs from the project will over time assist in broadening the offering and extending the tourism season with the resultant increase in jobs potential.

The international Cruise Tourism industry continues to grow presenting exciting opportunities for ports stretching from Cobh to Bantry and Fenit, and in-between. A national Cruise Tourism Strategy is underway, led by Fáilte Ireland and Cruise Ireland and is due for completion by the end of 2015. The objectives of this strategy is to fully understand the opportunities for Ireland in this sector, set a vision, targets and actions to ensure the country wins a greater share of this market. Where the business goes is also important. The opportunity for the SW is to optimise the recommended actions and win business for the region, dispersing that business across the region to spread the economic value and create jobs.

Educational Tourism is undergoing a national review to identify best prospects for growth for Ireland. This sector presents a range of opportunities from a variety of markets and profiles. In understanding the true potential of this sector, the SW will be well placed to identify how best to win business for the region.

Actions

Education and Training			
34	Develop a catering and hospitality centre of excellence to become internationally renowned in driving management capabilities, innovation and service excellence in this sector.	Q4 2016	ITT, CIT, KCC, IHF, DES and Fáilte Ireland
35	Develop FET programmes for new entrants to the Hospitality and Tourism sector as well as upskilling CPD programmes for those currently engaged.	Q1 2016	ETBs, Fáilte Ireland, Industry groups
36	Develop schools tourism initiatives such as “Know Your Own County” Campaigns and online tourism induction programmes for schools to (1) promote offerings within the region (2) develop future tourism ambassadors for the region (3) to highlight potential career opportunities in the sector.	Q3 2016	South West Local Authorities, Fáilte Ireland, business rep bodies, HEIs, ETBs, LEOs
37	Develop initiatives to cultivate ICT technologies which can positively impact the tourism experience.	Q1 2016	Tyndall, HEIs, Fáilte Ireland,
SW Tourism Strategy			
38	Develop Cork as a gateway destination and deliver clarity around the Cork brand and a cohesive 5 year tourism plan.	Q4 2015	CCC, CCiC, Fáilte Ireland, ITOA, Industry, CBA, Tourism Ireland, Port of Cork, Cork Airport, , Chambers
39	An Action Plan for Kerry Tourism Strategy will be produced	Q4 2016	KCC, Fáilte Ireland
Wild Atlantic Way			
40	Work with Fáilte Ireland to further develop and promote market-focussed visitor experiences and appropriate brand content along the SW section of the Wild Atlantic Way in line with the objectives of the project plan and brand guidelines.	Q2 2016	Fáilte Ireland, South West Local Authorities, LEADER
41	Provide appropriate scientific content to underpin the visitor experience along the Wild Atlantic Way, in a manner that ensures it can also be provided through mobile communication technologies.	Q3 2017	UCC, CCC, KCC, Fáilte Ireland
Ireland’s Ancient East (IAE)			
42	Work with Fáilte Ireland to develop <i>Ireland’s Ancient East</i> , which will help in scaling up the asset base in areas of Cork and achieve international “stand-out” for the area based on its comparative advantage in built and cultural heritage.	Q1 2016	Fáilte Ireland, Cork Co Co , Cork City Co, LEADER, Tourism Ireland
43	Provide for increased numbers of work placements at heritage sites to develop skills and interest in tourism as a career.	Q3 2016	OPW, Solas, DES,

Water Based Activities in Coastal Areas			
44	Develop a central investment plan for water based / coastal infrastructure to support business and job creation.	Q1 2016	South West Local Authorities, DAFM and local development companies
45	Develop and pilot a water based transport strategy in the SW to determine measures necessary to unlock and grow water based visitor transportation (integrated)	Q2 2015	LA's, DAFM , Ports, Fáilte Ireland
46	Develop a plan to improve the visitor experience and business capability of water activity providers (SMEs) active in tourism in coastal areas considered key to delivering on the objectives of both Fáilte Ireland's Experience Development strategy and the DAFM's marine strategy Harvesting Our Ocean Wealth (HOOW).	Q2 2016	DAFM, Fáilte Ireland, South West Local Authorities, LEOs
47	Prepare a plan to develop the Angling Economy along the South West (inland and coastal)	Q1 2016	Kerry Co Co, Cork Co Co, Inland Fisheries,
48	Develop the Cool Route Project	Ongoing	CIT
Additional Actions			
49	Optimise opportunities presented by the emerging 'National Cruise Tourism Strategy' (end 2015) to ensure Cruise ports in the region are winning a greater share of a growing international cruise business, by having a clear implementation plan for the region.	Q2 2016	LA's, Ports, Cruise Ireland, Fáilte Ireland
50	Optimise opportunities presented by the emerging 'National English Language Learning Tourism Strategy (end 2015) to ensure Cruise ports in the region are winning a greater share of a growing international learning tourism sector, by having a clear cross-agency implementation plan for the region.	Q2 2016	HEIs, DES, EI, Tourism Ireland, Fáilte Ireland
52	Undertake further work on route options and feasibility studies for potential development of Greenways in the region, in line with national Greenways guidelines.	ongoing	DECLG, South West Local Authorities, NTO, Fáilte Ireland
53	Develop a plan to link the potential to link walking trails, greenways and marine ways developing a Camino type offering for the SW region.	Q2 2016	Destination Kerry, ITT, LA, DAHG, Arts Council, Industry Partners.
54	Promote and incentivise greater business links between tourism and food sectors, promoting use of local produce by the local hospitality sector.	Q2 2016	Fáilte Ireland, Bord Bia
55	Údarás na Gaeltachta will run a pilot project in the South West region to build capacity in the tourism related enterprises under its remit.	Q2 2016	ÚnaG

6.3 Global Business Services

The Global Business Services sector has experienced strong growth over recent years, with a range of internationally competitive enterprises operating from the SW region. BPO is the contracting of a specific business task to a third party service provider. BPO involves a wide array of activities, which can be categorised as follows:

- Business Functions (back office): includes internal business functions such as invoicing, payroll, IT support, document management or purchasing; and
- Contact Centres (front office): includes both in-bound and out-bound call services including problem resolution, information provision, technical support (through from Tier 1 to Tier 3) marketing, sales lead generation and cross selling etc.

The consultations with stakeholders have identified significant further potential for growth in employment and exports for the sector, fundamentally underpinned by advances in ICT and changes in business models where public and private sector organisations continue to seek to outsource customer care and processing activities to third-parties with specialist expertise and scale.

There is potential to both grow the existing base of enterprises and their employment and to attract new startup job creation projects to the SW region, provided the skills, property and broadband infrastructures are in place.

Actions

Global Business Services			
56	Promote the advantages and potential of the region for Business Services.	Ongoing	IDA, South West Local Authorities, Research Centres
57	Enterprise Ireland and IDA will implement their joint BPO strategy to grow the BPO sector in Ireland	Q2 2016	EI, IDA
58	Promote the region to attract more data intensive activities to the region in light of the strength of broadband connectivity, energy and skills in the region.	Q4 2016	IDA, Business Representatives Bodies, Industry

Homeworking

The availability of high speed broadband has the potential to further unlock the full talent potential of the region, providing opportunities for individuals and employers to engage in new ways of working. The SW region is well positioned to develop an initiative in this area given the strong presence of IT SMEs and MNCs and strength of local initiatives in cities and towns in the region. There is also potential to develop hubs around existing community enterprise centres to support growth in self working, in particular in rural areas. It would also open up start-your-own business opportunities not currently available.

Homeworking			
59	Develop and market a value proposition based in the South West region in partnership with communities and stakeholders to offer the option of homeworking by IDA and EI client companies in order to provide new employment opportunities in regional locations which have the necessary broadband.	Q4 2015	IDA, EI, DSP, ETB, Industry, Communities, South West Local Authorities

International Financial Services

The Government’s new International Financial Services Strategy, IFS 2020, sets out the ambition to grow employment in the IFS sector by 10,000 over the period to 2020. To date the sector has managed to locate one third of approximately 36,000 jobs outside of Dublin. The South West region is well placed to contribute to this growth and has built a sizeable portfolio of International Financial Services (IFS) companies which can be a base for further growth. The location of companies such as Fexco, Apex, Citco, BNY Mellon, Clearstream, Laya (AIG) and Hedgeserv within a region served by two airports, two universities, several Institutes of Technology as well as a number of education and Training Boards is a good base to start from. FEXCo Limited, the largest Enterprise Ireland client in South Kerry and operates in the cutting edge financial technology sector. The strong relationships built by companies like Fexco with regional IoTs has to date ensured a steady supply of appropriately skilled graduates. The region has also built a strong cohort of relatively large contact centre operations, reflecting a core competency within the region that provides a basis for further growth and development.

A new wave of skills demands needs to be met, in particular in the Financial Technology sector. The Taoiseach officially launched the **Financial Services Governance Risk and Compliance Technology Centre**, hosted by UCC and funded by the Department of Jobs, Enterprise and Innovation through Enterprise Ireland and IDA Ireland in November 2014. This Centre is the latest addition to the network of 15 Technology Centres that are supported jointly by Enterprise Ireland and IDA Ireland and by 9 industry partners including; Propylon, Nathean Technologies, AIB, TerraNova, Citibank, Wolters Kluwer, Linklaters, Bank of Ireland and BAE Detica. The centre is active seeking new industry members and is aiming to grow its membership significantly through outreach and promotion activities over the next 3-6 months.

The **Financial Services Innovation Centre (FSIC)** at UCC provides Research, Development and Innovation (RDI) capabilities to domestic and international companies. The FSIC is located in the university’s Business Information Systems (BIS) group and is a leading research centre in the Irish business area. UCC is one of Ireland’s foremost research universities with an established reputation for excellence in teaching and research. The FSIC plays a pivotal role in stimulating innovation in the financial services sector. It provides a resource for global financial services companies to participate in cutting – edge RDI that will have global impact. The Centre works through forming collaborative partnerships with industry to drive innovation activity focused on delivering new financial products and services in finance, banking, insurance, funds, regulation, technology and consulting.

The **Centre for Investment Research (CIR)** is involved in many areas of investment research of benefit to investors, the financial markets industry and government agencies where its research findings have important applications. Its findings are likely to be of interest to both institutional investors, such as banks, insurance companies, fund managers etc and retail investors as well as to financial sector regulators. The research funding has enabled the Centre to gain access to databases in Ireland, the UK and the US on pension funds, mutual funds and hedge funds as well as high frequency stock market data which facilitates high quality research.

In addition the potential for applying the Apprenticeship Council’s new apprenticeship scheme to “learn and earn” strategies should be investigated as a way of achieving a faster turnaround between training and employment in the region.

Actions

International Financial Services			
60	Exploit opportunities to grow employment in the financial services and FinTech cluster in the SW region, through focused research programmes in risk and compliance and business process and services innovation	Q4 2016	Research centres in UCC, IDA, EI
61	Develop FinTech educational programmes and appropriate apprenticeship models.	Q4 2015	Research centres in UCC, ETBs
62	Enterprise Ireland will support enterprises and startups to fully exploit new opportunities as part of the implementation of the Government’s International Financial Services Strategy, IFS 2020	Q4 2016	EI
63	HEIs to support business growth through participation in Horizon 2020 proposals, SFI, EI and other funded and co-funded research opportunities related to Financial Services.	Q4 2016	HEIs, FSI, IDA, EI, ISIN, BPFi
64	Assess the potential to develop the South West region as a European hub of excellence for global regulation and compliance management for global operations, drawing on the expertise in the SW region in ICT and pharmachem.	Q4 2015	GRCTC, Business Representative Bodies

6.4 Construction

In May 2014, the Government published ‘*Construction 2020 – a Strategy for a Renewed Construction Sector*’ – to deliver a fresh start for construction. The Strategy is aimed at ensuring that Ireland has a strong and sustainable sector, capable of building the houses and infrastructure we need as a society, and making its full contribution to economic recovery.

In addition, the Living City Initiative, announced in Budget 2013 and extended subsequently to six cities, targets certain areas that are most in need of regeneration in Dublin, Cork, Limerick, Waterford, Galway and Kilkenny. The Minister for Finance is hopeful that the Initiative will be fully rolled-out in 2015.

The Education and Training Boards administer the apprenticeship programme on behalf of SOLAS within the region, through employer engagement, apprentice recruitment and registration.

There was a strong view from the consultations with stakeholders in the SW that there are opportunities to immediately create employment in an expanding construction sector and for construction-related enterprises in the SW to develop in export markets in areas such as smart materials, ICT, design and built environment. A return to sustainable levels of construction activity is also important to improving the business environment in terms of attracting people to the region with affordable accommodation and quality office and industrial units. A key challenge for the sector is the need to develop and upskill craft persons, both to help those returning to work to reskill and to increase apprenticeships by the ETBs for new entrants.

Proposed Actions

Construction			
65	Promote the transfer of technologies to enterprises of the technologies being developed at the Sustainable Building Zero2020 activities at CIT and the greater use of the energy and heating testbeds at CIT.	Ongoing	CIT
66	Set out a plan for residential development in the region and provide the infrastructure necessary to open up development land in a sustainable manner consistent with Development Plans.	Q4 2015	South West Local Authorities, DTTAS, DEHLG/SRA
67	Use viaFulcrum to exploit the potential for greater collaboration in the built environment by developing an R&D cluster to develop technology as this sector becomes more technology driven.	Q1 2016	viaFulcrum, South West Local Authorities
68	ETBs to increase, as appropriate, capacity for training of apprentices for manufacturing, engineering and construction as the sector recovers, together with addressing the continued need for upskilling of craft persons and training for the unemployed.	Q4 2015	Solas, ETBs, DSP, Intreo, HEIs, Industry
69	Promote apprenticeship participation to relevant industry.	Ongoing	ETBs and IoTs, Apprenticeship Council

6.6 Engineering and Manufacturing

The South West exemplifies in a range of areas is a leader in the most advanced manufacturing technologies and processes in the world, within an ecosystem of support services which is of the highest regulatory and compliance requirements, such as in complex pharmaceutical and medical technology manufacturing. The national ambition for manufacturing sector as set in the Government's 2014 Strategy, Making It In Ireland, is to achieve potential for employment growth of 40,000 over the period to 2020 and that Ireland will be internationally renowned as a place that excels in manufacturing and where manufacturing accounts for a significant share of economic activity.

A key requirement for manufacturing to thrive in the South West is the continued development of the capabilities of the sector and to broaden and diversify the range of related manufacturing activities so as to build resilience for the future. It is important that highly specialised plants broaden their activities along the value chain, upstream and downstream, through engagement in research in product and process development and through building distribution, shared services, marketing and sales capabilities over time.

There is a significant need for the manufacturing sector to engage with post primary schools in order to promote an understanding of the sector as a provider of realistic employment opportunities for school leavers and graduates.

A continued focus on supply of required skills for the sector in the regions by ETBs and HEIs is essential, most particularly to meet demand for manufacturing skilled trades for sectors such as food, medical devices, engineering and Pharma/Biopharma, and for apprenticeships/traineeships in formal operative level traineeships, manufacturing technicians, manufacturing machine operators, practical engineering apprentice (progression up to level 8), polymer technologists, and toolmakers. There are many Skillnets who are developing programmes to support for upskilling employee within manufacturing from level 5 to level 9.

Kerry ETB Training Centre offers the full range of Apprenticeship Services to Businesses in Kerry. The Training Centre runs courses in several of Apprenticeships and have submitted for Wind Turbine Maintenance and Welding under the recent National call for New Apprenticeships. The ETBs Further Education Colleges also provide pre apprenticeship type courses with a particular STEM focus.

By 2020 manufacturing will be different from what it is today. New materials (e.g. ceramics, metals and alloys, powder, polymer, 'smart' materials) and associated new processing methods have the potential to revolutionise existing industries as well as to create new ones. The SW region is well positioned to meet these needs, with for example, Centre for Advanced Manufacturing & Management Systems (CAMMS) in CIT promote awareness in industry of modern production management systems and providing training courses in Advanced Manufacturing and Management Systems.

Manufacturing and engineering are core strengths of the South West Region and there is a need to showcase and harness this sector. This is particularly important so as to attract more young people to technology careers in manufacturing. There is also potential to better link MNCs and startups entrepreneurs so as to help get innovators to bring concepts to market, which would retain downstream manufacturing of innovations in the region.

Actions

Manufacturing

70	Develop a showcase of the region’s manufacturing base, with a particular focus on attracting young people to careers in manufacturing. The skills demand is for a mix of apprenticeships and third/fourth level qualifications. This will include a pilot a video roadshow to show to primary students’ robotics in school. Manufacturing companies to promote more STEM participation in primary and secondary schools.	Q4 2015	HEI’s, ETBs, IT@cork, Ibec, CEIA
71	Develop an initiative to support 3D printer and other digital tools access at primary and post primary level. Roll out pilot of introducing 3D prints / work stations for schools in Cork and Kerry. There is also a need to upskill students on CAD and CNC.	Q4 2015	CIT/ITT, Kerry ETB (video facilities), EI, CETB, Ibec
72	Build global services base around manufacturing base already in the region (MNCs). Share best practice, grow opportunity e.g. finance, supply chain, HR and procurement.	Q4 2015	Local FDI companies, Ibec, IDA, Chambers
73	As part of its Global Sourcing initiative and the drive to foster SME supply opportunities into MNCs, Enterprise Ireland and IDA Ireland will embark on a major Trade Mission to Cork.	Q4 2015	EI and IDA

6.7 Retail

The retail and wholesale sector in the South West has contracted in the downturn as consumer spending was ratcheted back, as in all other parts of the country. The most notable impact of the reduced activity in the retail sector is on the main streets of towns and villages of the region. A number of initiatives are being progressed across the region by local authorities and in partnership with various retail associations. The Cork Development Forum, the Cork City Forum is focusing on reinvigorating the city centre and other groups such as *Northside for Business* is also having regard to the development needs of the retail sector. It is important that these initiatives are further developed support community led initiatives to retain retail presence in rural villages and that learnings from successes in other regions are built on.

In order to increase footfall there is a need to focus, in particular, on improving the business environment in the town centres, which requires cohesive efforts by landlords and retail operators and the local authorities. It also requires local authorities to take a short and long term perspective on urban renewal. The retail sector has a reach into every locality in the country and is part of every community. In addition, the retail sector indirectly supports jobs in other areas, such as logistics and distribution and provides an important outlet for Irish products. In spite of a general improvement in the number of people at work nationally, employment increases in the retail sector have been sluggish.

In 2014, as part of the Action Plan for Jobs, the Government established a Retail Consultation Forum. This Forum provides a platform for a structured engagement between the Retail sector and relevant Government Departments and agencies. The Joint Oireachtas Committee on Jobs, Enterprise and Innovation will publish a report on Town Centre Retailing in 2015 and this will be considered by the Retail Consultation Forum with a view to identifying actions that can be taken to support retail in town centres. In addition there is a need to continue to focus on enhancing skill base of retailers and to enhance online trading and use of social media in advertising and sales. Effective use of social media can enhance efforts to encourage consumers to support their local businesses, keeping more money and jobs in the local economy.

Through its Beacon Retail programme, Cork County Council has led the development of best practice retail services in towns across Cork through training and mentoring. As a result participating retailers develop a strategic growth plan tailored to their own business. In addition they gain an added confidence in their ability to run and succeed in business. The individuals also get a realisation that they need other businesses in the town to do well, in order for their business to do well. The group dynamic has also borne fruit in terms of town and community development. A focus on upskilling for the retail sector, and the provision of appropriate and targeted CPD opportunities for retail sector works can be provided by CETB through its PLC colleges and Training provision.

Actions

Retail			
74	Promote the move to ecommerce and double the number of on-line vouchers drawn down by retailers in the region	Q2 2016	DCENR, Retail associations, LEOs
75	Assess options for Urban Renewal Schemes and incorporate social and community development aspects.	Q4 2015	South West Local Authorities, Chambers, Retail Associations

76	Bring forward development proposals to enhance the consumer experience and attractiveness of town centres for shopping and to develop world class Retail supports for both individual retailers and for retail centres throughout the region	Q2 2016	South West Local Authorities, Chambers, Retail Associations
77	Local Authorities and Retail Associations to develop collaborations to support the regeneration/development of their town and city centres through Town Centre Strategic Development Plans.	Ongoing	South West Local Authorities, Chambers, Retail Associations

6.8 Lifesciences

Cork is renowned as a national cluster for life sciences, with a strong record with pharmaceutical and medical device companies. Currently, IDA positions the South West as offering a strong cluster in Pharmaceuticals and Medical Technologies (Pfizer, Novartis, GSK, Janssen, Abbvie, Eli Lilly, Gilead, GE, Stryker, DePuySynthes, Boston Scientific, Gilead, and Astellas, among others).

The success of the South West in attracting life sciences has seen the growth in associated support services, such as, engineering consultants and project managers, facilities management, clean room providers, specialist recruitment agencies, tailored educational courses, etc. This specialization of services has increased the attractiveness of the cluster. IDA also has utility-rich strategic sites available for large scale development in the region.

The region is well positioned to take action now to try to ensure an adequate supply of talent in the future and leverage its strong reputation to attract further investment and employment. The sector will need to develop the complexity and value add of its activities and this will necessitate an ongoing focus on talent development, in areas such as combination product development, customised medicine, 4D additive manufacturing and clinical research and validation. In Medical Technology specific technical skills will be required to support the move towards wearables, homecare, prevention and diagnostics. The Internet of Things, big data and data analytics will underpin new healthcare solutions along with advances in coatings, materials research, and nanotechnology. Developing and attracting key opinion leaders will be important to drive clinical research as will stem cell research and tissue engineering. Tyndall National Institute can play a strategic role to support the SW region in truly becoming a medtech destination

As part of the Action Plan for Jobs, DJEI together with the Department of Health, the HSE and Enterprise Ireland has developed a pilot Health Innovation Hub in the SW region, through UCC, in partnership with MEDIC at CIT and health providers in the region. This initiative has successfully linked 27 companies with HSE partners to trial, test and develop new applications and services to improve patient care and is funded to end 2015. The region has also engaged in BioInnovate, the medical technology innovation programme. UCC hosted a team of fellows in 2014, and should continue seek to attract same.

Proposed Actions

Lifesciences			
78	In the Life Sciences area, IDA will expand the Life Science Value Proposition for the South West Region to attract investment from new companies.	Ongoing	IDA
79	Further exploit the potential for BioInnovate, headquartered in NUIG, but with centres in UCC as a means for innovation and job creation in the medical devices sector	Q4 2015	BioInnovate, EI, Ibec
80	Develop a longer term strategy that will identify the requirements for cluster development and cross-sectoral and cross-regional collaboration over the next decade so as to sustain the region as a leading location for investment.	Q4 2015	PharmacChem Ireland, IDA, EI, PCI

6.9 ICT Sector

The South West region has a particularly strong presence and research capability in the ICT sector, with over 11,000 people employed in IDA client companies alone and is certainly an opportunity for growth, given the pace of change in this sector internationally.

There is an emerging ICT cluster in the South West Region with strong FDI investment in the region from companies such as EMC, Apple and VmWare. There is further potential to strengthen the ICT cluster in the region, linking Irish companies and multinationals with the universities and institutes of technology and each other to respond to expected demands of the ICT industry.

IT@cork serves a critical mass of over 200 MNC, SME and Tech Startups members in the South West region whilst bringing together industry, academia, business support agencies and local authorities. As technology is now embedded in every sector of the economy additional support is required to provide a co-ordinated cross-sectoral approach to address the ICT requirements in agri-food, tourism, manufacturing, energy, healthcare, life sciences. IT@cork estimate this could lead to the delivery of 1,250 additional ICT jobs in the South West region. These jobs will be created through the following:

- Focused supporting of internationalisation of ICT companies in the region through the Business Roaming Agreement.
- Provision of European ‘Best in Class’ cluster programmes e.g. Ambition PME, CyberLab, and CyberForum TeamUp.
- Provide development service to members to: drive collaboration, access Horizon 2020 funding, Dealstart.
- Focused pillars of research and development aligned with Cyber-Security, Internet of Things and 3D.

In addition, the Cork Electronics Industry Association represents High Tech companies in the Cork region working, working closely with (IDA, Enterprise Ireland, the Cork Education & Training Board, the Cork Institute of Technology and University College Cork, to ensure a sophisticated technological infrastructure is in place to enable the industry to grow and prosper. It has over 50 industry members, split evenly between FDI, (Multinationals) and indigenous industry. It offers its members an invaluable source of business networking, best practice sharing, and a forum to collectively address individual member issues and general industry topics. The organisation has extensive engagement with schools promoting STEM through their involvement in Discover Science week and in organising the annual CEIA Schools Robot Competition.

Actions

ICT			
81	Promote opportunities to integrate ICT across all industries (for example Agri-Food and Tourism).	Q4 2015	IT@cork, Tyndall, Ibec
82	The successful track record of the South West region in attracting and growing the base of technology companies offers a cluster to attract further investment. IDA Ireland will develop tailored propositions across a number of emerging sub sectors including Cybersecurity; Internet of Things, Data Analytics, Software Development etc. to continue to attract additional FDI investment in this sector	Q4 2016	IDA, Enterprise Ireland, HEIs, IT@cork, Tyndall, CEIA

83	IT@cork to appoint a cluster manager to develop the emerging ICT cluster in the South West region. Their role will be to boost job creation by exploiting growth opportunities in this sector.	Q4 2015	IT@cork / European Tech Cluster for the region
84	Open and grow the Ludgate Digital Media Hub Ludgate in Skibbereen (see Case Study Below)	Q3 2015	Ludgate Group

Case Study

Ludgate@Skibbereen, Digital Hub and Strategy,

The Skibbereen digital strategy is being led by a dedicated and experienced steering group of entrepreneurs, digital ambassadors, and business owners of thriving local enterprises have worked over the last number of months to create a digital outlook for Skibbereen and the surrounding area of West Cork.

At a local level the aim is to establish high quality connectivity, through infrastructure, development of the digital hub and opening up expertise to the local community which will develop West Cork into a sustainable rural economy. The Ludgate Digital Hub, the first of its kind in a non-urban area, will provide office space for over 72 people when fully operational and will also provide employment for more than 20 people in the construction process. This will be the first of many anchor buildings in Skibbereen. Ludgate, named after Skibbereen native Percy Ludgate (who used to live on the same road of the Ludgate Building) took his place in the history of digital technology by designing the world's first portable computer in 1907. Following the footsteps of our innovative past, the Ludgate group aims to capitalise on developing enterprises in the area that can work in rural areas, with the advance of technology we believe it is no longer necessary to locate in the already congested urban areas.

The second aim fits into the EU digital agenda, as we will host Ireland's first ever National Digital Week in November 2015. Our initiative attempts to create a blueprint for rural digital regeneration, which can be applied to our rural areas at national level, and utilised as a model for rural development at international level.

These initiatives are part of the delivery of an overall digital strategy for the West Cork region, with the objective of maximising the number of businesses in Skibbereen and its hinterlands that are digitally enabled and engaging in ecommerce, to make the region a global hotspot and demonstration site for Internet of things, innovation in food/agriculture supply chain, data analytics and educational services innovation, to attract new investment and encourage entrepreneurs to the region and to improve the quality of life of the people of the region through enhanced education and healthcare provision and homeworking. See www.ludgate.ie

6.10 Multimedia, Culture, Content and Design

The Government has designated 2015 the Year of Irish Design. Irish Design 2015 (*ID2015*) is an all-island initiative and will showcase the best of Irish design, both nationally and internationally. It represents an opportunity to promote and develop further Ireland's capabilities in business-related design across all sectors of the economy and to improve capacity for quality design across the enterprise sector. In particular design is critical to success in new and emerging sectors like medical devices, ICT and gaming, all of which are prevalent in the South West region. With increasing global interest from consumers in accessing high quality digital content and with the ongoing integration of music, video, photography, art, technology, multimedia and culture (including Irish culture and traditional Irish music, dance etc.), the South West Region is well positioned to become both a national and international centre for sustaining and facilitating the integration of these disciplines. Through this initiative, it should be possible to support the areas that nurture the Irish language, music, dance and culture while also making them attractive places for tourists to visit and allow the development of high quality multimedia content that can be distributed globally. Such a centre, that has the potential to build on the existing traditional music festivals and other festivals (such as 'Other Voices') held in Kerry and to link with the traditional theatre that exists in Siamsa Tire, Muckross House etc. and then to brand and market the overall package as a County Kerry 'product' that would have global appeal. This initiative has significant tourism and job creation benefits but it also has huge potential to strongly support traditional Irish culture, particularly in rural and coastal areas and to help sustain high quality jobs in such rural and coastal areas.

Culture and Content Industries

The culture and content industries, including those related to music, art, digital content, digital archiving, etc. and education such as teaching English as a foreign language and linked to other courses such as business present opportunities for the region. There are specific opportunities for the peripheral/coastal areas and Gaeltacht areas, together with opportunities for sourcing external funding such as Interreg and other EU funding. There are also opportunities for eLearning through the HEI's for businesses and individuals.

There is significant potential for the development and exploitation of this sector and to link this to tourism and the environmental sectors. Within the FET sector, a number of nationally and internationally recognised courses in the areas of music, art, drama, digital media, film and television production and photography, linked in some cases to higher education programmes, provide a substantial cohort of available talent that could be leveraged to develop and support this sector.

Cork and Kerry are at the heart of Ireland's vibrant arts and culture scene – music, visual art, craft and design, theatre, poetry, dance, festivals, food, sport are all catered for – and thriving - in this region. This brings benefits not just for tourism, but also as a form of cultural knowledge, an enabler for cultural participation.

The Arts are vibrant in Kerry so it is no surprise that there is high quality education and training provision in this field. Listowel, often viewed as the home of literature in the county is where Kerry ETB houses much of its Culture and Heritage provision at the North Kerry College of Further Education. While in South Kerry, Tech Amergin, in Waterville, is an Arts and Education Centre with high quality work being produced every year in the visual and performing arts. It is good to note that as 2015 is the European Year of Design, Kenmare Adult Education centre has been commended in particular for its work in this area.

CIT Crawford College of Art & Design and CIT Cork School of Music provide emerging artists and musicians; UCC through its School of Music and Dram and the Glucksman Gallery are also a key

enabler in this space. There are also additional advantages for companies in the region seeking to attract talent, in terms of access to quality cultural education for children.

In relation to audiovisual, locations in SW region are second to none. There is strong interest among practicing freelancers. Animation is strong in Dublin and in the east, but there are strengths in the SW region also.

Audio Visual

The Audio/visual sector is important creatively, but it is also very significant in economic terms both for the direct economic activity and for its benefit in promoting the South Western Region as a destination to visit. The Creative Capital report, prepared for the Minister for Arts, Heritage and the Gaeltacht in 2011, confirms that the audiovisual sector in Ireland accounts for over 6000 full time equivalent employees. The Creative Capital report also states that the audiovisual sector’s annual economic value exceeds €550 million, a substantial part of which is foreign direct investment. This has the potential to increase to 10,000 jobs and €1bn over the next five years to 2020. The sector includes approximately 500 Irish owned audiovisual production companies, mainly SMEs, whose output includes film, television, animation and video content.

Support for the sector in Cork was boosted by the Cork Screen Commission, initiated in 2011 by Cork City and County Councils with the purpose of supporting and developing film and audio/visual production in the Cork Region.

In its first phase, the Cork Screen Commission, under the guidance of Cork Film Centre did much valuable work with film professionals in the Cork region. It saw the establishment of a centralised location and crew service point, the creation of a searchable on-line locations database and engagement with national and international production companies. It also saw the beginnings of a more active dialogue between the local authorities and the Cork audiovisual sector and improved linkages with national agencies, such as the Irish Film Board.

The recent launch of ‘Film in Cork’ will build on the earlier work, but will now concentrate on increasing the number of productions made in Cork and showcase the resources that Cork has to offer film makers. The South West Region has the finest range of film locations to be found anywhere on this Island. It also has top class resources to support all forms of audio visual production. Given the calibre of our film and media graduates it is natural that we should become a major player in film production.

The introduction of the new film tax credit scheme in 2015 and the associated commitment to extend tax relief to 2020 will help to make Ireland an even more attractive location for foreign film and TV production”.

Actions

Multimedia and Design

85	Establish the region as an acknowledged centre for the interaction and integration of creativity, music, arts, photography, video, multimedia, culture and technology	Q2 2016	South West Local Authorities, HEIs, ETBs
----	---	---------	--

86	<p>Develop a Creative Hub as a dedicated space designed to support arts practice, research and learning and facilitate the integration of this work with the Irish creative arts, technologies, digital humanities and civil society networks. Work with local authorities and locally and nationally based arts and cultural organisations, such as the Munster Literature Centre, the Cork Opera House, Triskel Arts Centre and the Abbey Theatre on the development of this project.</p>	Q4 2018	UCC, South West Local Authorities
87	<p>The HDI Centre – Hub for Design and Innovation will be developed to create a space to facilitate growth in research and development in the region and subsequent job creation through the generation of innovative solutions in product/service design and delivery. The cross sector disciplinary environment of the hub will build and share models of best practice reducing lead time to market for new and existing businesses. Facilities will be made available which will foster:</p> <ul style="list-style-type: none"> • Innovative design thinking in product/service idea generation • Prototype development • Product/service design testing <p>It would provide innovative model solutions for different elements of the business process from concept evaluation, to manufacturing/service design, supply chain to business models, market rollout and the crunching of the key financials.</p>	Q2 2016	ITT, CIT, UCC, South West Local Authorities, Business Representative Bodies, ETBs
Culture and Content Industries			
88	Leverage the capacity of the National Digital Skills Centre in Kerry and the programme offerings of KETB and IT Tralee, to exploit opportunities presented by the planned film studio in Limerick.	Q3 2016	ITT, KETB and KCC
89	Build the ICT capabilities for high-end design across all sectors in the region.	Q4 2016	DCCoI, Ibec, EI
90	Maintain accessible database of Film sector resources including locations, personnel, equipment and available covered spaces such as warehouses available for short term use	Q4 2015	South West Local Authorities
91	Develop Business Support Network comprised of local authorities and others to ensure that productions can be made with coordinated service provision by all in a timely and cost effective manner	Q4 2015	South West Local Authorities, State Agencies
92	Promote the region’s potential as a base for international film and media production. Promote and encourage the creative industry through the development of physical workspace and retail opportunity.	Q2 2016	South West Local Authorities, HEIs
93	Roll out design thinking modules as elective in HEIs, Design thinking can be applied to business models as well as to products and services	Q2 2016	HEIs/ETBs, Springboard
94	Promote the Ireland’s Best Young Designer and other design competitions and initiatives to encourage and identify young people in education showing great propensity towards industrial and product design (red dot award for young designers)	Q4 2015	DCCoI, Schools, HEIs, ETBs

6.11 Energy, Green Economy and Marine

The Green Economy continues to hold potential as a new source of growth for Ireland. The Green Economy encompasses a range of activities, spread across different sectors of the economy, which have the common objective of providing goods and services in a sustainable way that reduce the impact on the environment. It includes activities in areas such as sustainable food production, tourism, green financial services, waste management, renewable energy, smart grids and energy efficiency. Among the key initiatives underway in the SW region include:

- Cork City as a European Green Capital - City Council Energy Initiatives
- International Energy Research Centre at UCC
- 90% of the State's strategic oil reserves held in Ireland are stored in Cork.
- 31% of Ireland's oil products are supplied from the region.
- 100% of Ireland's indigenous natural gas is currently produced in the region
- 14% of Ireland's electricity production is produced in Cork with further strategic sites in Tarbert and Moneypoint; and
- 19% of Ireland's wind energy comes from the region.

Areas with employment growth potential include the renewable energy generally and specifically in marine and tidal energy, renewable gas and bio-methane and in the production of micro-algae bio-mass and value added by products.

The Kerry ETB Training Centre is one of the only two Wind Turbine Maintenance courses in Ireland that produces qualified technicians to service this growing industry and has a unique facility for training on Wind Turbines and Overhead lines. Kerry ETB is presently working with Industry in the development of Fibre Cabling and Splicing both on its Overhead lines course and as a stand-alone program to provide Industry with suitably qualified workers for the National Fibre roll-out.

In the area of waste management and energy recovery the consultations have identified the potential for the development of the Circular Economy in the SW, in line with the proposals from the European Commission and these initiatives require further consideration. Such an initiative could lower costs to business - reducing waste to landfill – and enhance best practice support business competitiveness.

The Clean Technology Centre (CTC) at CIT provides a wide range of services to Irish industry across many industrial sectors, through consultancy work and also through the Green Business Programme. CTC has provided training, awareness raising and environmental consultancy to the food, construction, medical devices, energy, plastics, tourism, service, pharmaceuticals, textiles, hospitality, metal finishing, healthcare, retail, printing, chemical, adhesives, membranes, waste management, electronics, fish, brewing, dairy, furniture, and dry cleaning sectors, among others. Some CTC services to industry include: environmental management systems, audits, training, integrated pollution control licensing, strategic environmental management, sustainable waste management, grant aid and award application assistance, resource efficiency, cleaner technologies,

A new cluster is emerging in the region based around the marine and renewable technologies. The development of the Irish Maritime and Energy Resource Cluster (IMERC), which comprises of UCC, CIT and the Irish Naval Service, will be a strong magnet of attraction for the South West. A combination of NMCI and MAREI will harness and integrate diverse research and industry expertise through the development of the innovative cluster which incorporates the Beaufort Research Laboratory (UCC), the National Maritime College of Ireland (NMCI, CIT) and the Naval Service of Ireland.

Eirgrid

Eirgrid is a state-owned company and is responsible for the consistent and reliable transmission of electricity that homes and businesses can rely on. In March this year EirGrid published a Draft Strategy on Ireland’s Grid Development Strategy. They sought feedback from the public and stakeholders on their views on the future development of the national electricity grid. The draft strategy reflects a changed economic context and opportunities offered by advanced transmission technologies.

Central to the draft strategy is the provision of a strong and reliable electricity supply to the Southern region. This will ensure that the region is equipped for investments by both energy intensive indigenous and multinational companies seeking to locate or expand in the region.

As part of their options to strengthen the electricity grid in the region, EirGrid have brought forward a number of options to progress the Grid Link project including the new option which introduces technology known as ‘series compensation’ to strengthen the electricity grid in the southern region.

In addition, the Irish and French Government have signed a Joint Declaration examining the feasibility for a submarine electricity interconnector between Ireland and France. EirGrid are currently undertaking preliminary work to assess this feasibility. If built, this would connect the southern region with the mainland European electricity grid.

The South-Western region accounts for a significant proportion of national energy supply with a high level of renewable energy in Co Cork and Co Kerry, thermal generation at Marina, Aghada and Whitegate and hydro-generation on the River Lee.

Forestry

The forest resource is a key asset to the South West region. Forest sustainability is the key principle on which forest planning is based. This requires the meeting of four closely related objectives:

- Wise use of natural and cultural resources
- Effective protection of the environment
- Sustainable supply of forest products (wood and non-wood)
- Working with communities and support for amenity services.

The South West of Ireland has large production capacity of over 14.2 million cubic metres of timber (standing stock) with 2020 projected harvestable stocks in excess of 715,000 cubic metres. Co. Kerry’s projection for private forestry production is greater than Coillte in 2020 which represents substantial and ongoing private planting.

Actions

Energy, Green Economy and Marine

95	Demonstrate the role 'facilitated industrial symbiosis networks' play in achieving green economic growth and improving productivity in SME's through more efficient resource management	Q1 2016	South West Local Authorities, EPA, SMILE
96	Develop the Irish Maritime and Energy Resource Cluster (IMERC) as a research and commercial cluster of world standing in collaboration with CIT and the Irish Naval Service.	Q4 2015	IMERC partners, UCC, CIT, Naval Service, EI

97	Complete the construction of the UCC Beaufort Laboratory on the IMERC site by end of 2015. Industry suites, incubation units and enterprise centres developed and operational by end of 2016.	Q4 2015	IMERC partners, UCC, CIT, Naval Service, EI,
98	Develop linkages with Cork City, Cork County and Kerry County to build on the 'UCC: A Green University' programme and explore how it could be expanded across, and integrated into, the region and how, in turn, it could support the branding of the South West Region for 'green tourism', 'green food' and 'green education'.	Q1 2016	UCC, South West Local Authorities
99	Establish a working group for renewable energy comprising relevant stakeholders. Promote various alternative power pilots underway in the region.	Q4 2015	South West Local Authorities, HEIs, Coillte, Energy Cork
100	Promote and assist the delivery costs savings through energy efficiency programmes and training for businesses and public sector organisations in the region	Q2 2016	SEAI, South West Local Authorities
101	Work with SEAI to develop and promote Sustainable Energy Communities model in the region and identify willing early adopter community to act as exemplars.	Q2 2016	SEAI, South West Local Authorities
102	Complete a regional renewable energy analysis to examine the potential for biomass district heat in towns in the south western region.	Q4 2015	SEAI, South West Local Authorities
103	Promote sustainable enterprise-led energy initiatives which help to reduce costs and sustain jobs, such as the wind turbine cooperative initiative in Ringaskiddy.	Q1 2016	South West Local Authorities, IDA, SEAI, Chambers
104	Engage in a feasibility study to Investigate the possibility of creating a sustainable ecological education and research hub in Kerry where tourists including education tourists, students both national and international can to experience and appreciate one of the most interesting ecological environments in the world.	Q4 2015	KCC, HEIs.
105	KCC to progress the county accessing the natural gas network.	2017	KCC
106	Ensure that the electricity transmission grid in the region is strengthened to enable maximum investment by industries that rely on large energy consumption.	Ongoing	EirGrid
107	Promote the Biogas industry and bio methane production industry in the region work with Bus Éireann and Gas Networks Ireland to develop 'Ireland's Greenest Bus Corridor' – utilising CNG and Biogas buses to service the Ballincollig-Cork-Ringaskiddy route.	2017	South West Local Authorities, DCENR, DAFM, DEHLG, HEIs, Energy Cork

108	Continue to support Cork’s ambition to be a low-carbon vehicle hub.	Q2 2016	Energy Cork, Drive4Zero. Gas Networks Ireland, Bus Éireann, South West Local Authorities
109	Explore ways of utilising micro-algae for production of energy, nutrition, animal feed and bio-pharma products.	Q2 2016	HEIs, DCENR, DAFM, DEHLG,
110	Increase uptake and delivery of energy efficiency technology - meeting Ireland’s climate change targets, reducing energy use, construction industry jobs. Develop links with international consortia doing likewise, especially the Investor Confidence Project.	Q2 2016	South West Local Authorities, SEAI, HEIs, Industry, Energy Cork
111	Identify the specific HR requirements of active energy trading companies in Cork (e.g. Bord Gáis Energy, Brookfield Renewable Energy Group) to meet their demand for energy traders. Encourage HEIs to deliver necessary training via existing courses	Q4 2015	Energy Cork, HEIs
112	CIT to develop and deliver energy efficient retrofitting training for building professionals and site operatives	Ongoing	CIT, South West Local Authorities, Energy Cork

Circular Economy⁸ and Waste Management

113	Develop a programme to promote circular-economy expertise across region and that would enhance overall sustainability	Q2 2016	South West Local Authorities
114	Pursue the opportunity to be a leader in minimising packaging and establishing a deadline within which all packaging must be recyclable.	Q2 2016	EPA, Repac, CTC
115	Promote the Clean Technology Centre in CIT and foster the opportunities that the circular economy/industrial symbiosis presents for companies in the region.	Q4 2015	CIT, South West Local Authorities, DJEI, DEHLG, EI, Business Representative Bodies, HEI

Natural Resources

116	Promote the potential for commercialisation of natural products/extracts from the natural resources in the region, on land and in the sea ('blue-tech') through greater collaboration between agriculture, aquaculture research and business.	Q2 2016	HEIs, South West Local Authorities, SMEs, IMERC Partners & MNCs
-----	---	---------	---

⁸ The circular economy refers to re-using, repairing, refurbishing and recycling existing materials and products, turning ‘waste’ into a resource. Using resources more efficiently has the potential to bring new growth and job opportunities. The European Commission estimates that better eco-design, waste prevention and reuse can bring net savings for EU businesses of up to EUR 600 billion, while also reducing total annual greenhouse gas emissions and they estimate that additional measures to increase resource productivity by 30% by 2030 could boost GDP by nearly 1%, while creating 2 million additional jobs.

117	Examine with National Energy Efficiency fund managers / NTMA the feasibility of a large scale renewable District Heating plant and network for Tralee and develop and Pilot the Biomass Resource District Heating in the Towns of Tralee and Killarney thus creating the potential for significant associated job creation within County Kerry subject to funding.	Q4 2015	Kerry County Council, HEIs
118	Commence pilot upgrade of public lighting by replacing the existing LA stock of sodium lamps with high efficiency LED units to reduce energy consumption costs and also to reduce lamp maintenance costs.	Q4 2015	South West Local Authorities, HEIs
Marine and Forestry			
119	IDA will support the development of this sector through site visits by companies, marketing of the Beaufort Research Centre, National Maritime College of Ireland (NMCI) and supporting infrastructure of Cork harbour, Fenit and other relevant infrastructure in the South West and the Irish Naval service to attract non-traditional FDI opportunities.	Q2 2016	IDA, EI, IMERC, South West Local Authorities, MaREI, BIM
120	Undertake a feasibility study of the case for the creation of a Technical Marine and Marine Sciences education, training and research centre in Kerry.	Q2 2016	HEIs, ITT, KETB
121	Development of Haulbowline Island as an emerging hub for naval activities, maritime enterprise, tourism and recreation	Q4 2016	South West Local Authorities, HEI, Irish Naval Service
122	Undertake a feasibility study of the case for the creation of a maritime security and surveillance /marine robotics hub, joined with emerging cyber-security expertise, within the context of IMERC in Cork Harbour	Q4 2016	IMERC partners
123	Assess the economic potential of forestry and job creation	Q1 2016	Coillte, Teagasc, South West Local Authorities.

6.12 New Sources of Growth and Demonstrating Solutions to Grand Challenges

A number of disruptive ‘lighthouse’ type initiatives were identified as part of the consultation process, which stakeholders agree are worth pursuing for the region and will be take forward, either through feasibility studies or joint private-public initiatives over the next year. In many cases these are building on burgeoning initiatives already underway in the region. The key objective is to develop pilot and demonstration initiatives that illustrate the enterprise potential of new technologies or help to address grand challenges facing the region or society more generally, where the South West could establish a leadership position.

Building on the international success of Smart City programmes, the Cork Smart Gateway is a multi-stakeholder collaboration led by Cork City and County Councils, Nimbus Centre and Tyndall National Institute. Involving participation from the quadruple-helix this initiative will seek to meet the challenges of increased urbanisation by developing, testing and deploying Smart technologies in the region in areas such as energy, water, transportation and citizen engagement. The Smart Gateway programme outlines a number of objectives including an attractive environment for economic investment, more effective use of resources, safer public spaces and infrastructure for an aging population and more efficient public services, all supported by leading edge technologies. The Smart Gateway PMO will achieve this by:

- Leading the regional participation on behalf of all stakeholders in European Co-Funded projects;
- Promoting the adoption and implementation of Smart initiative throughout stakeholder organisations;
- Seeking to secure funding and other supports for initiatives that satisfy the Smart Gateway criteria.

Cork city has achieved follower status in the €80Bn EU Horizon 2020 programme which will position the region for a future Lighthouse bid. Tyndall, along with its hosted centre IERC (International Energy Research Centre) has considerable expertise in wireless sensor network technologies and energy harvesting systems which enable the deployment of the internet to make an energy efficient smart build environment, both city and urban. The Nimbus embedded systems research centre in CIT has accumulated considerable experience and expertise in the Internet of Things becoming Irelands largest in this area. The considerable number of innovative private sector organisations in the region which, through representative bodies such as the Cork Chamber, IT@Cork and Energy Cork, have contributed to the Gateway initiative has enhanced the quality and ambitions of the programme. This can ultimately support the delivery of an improved and sustainable quality of life in the region making it a good place to live and invest.

Actions

Smart Region		
124	Rollout ‘Smart Region’ infrastructure in the region, drawing together the major urban centres in Cork and Kerry. This would include the deployment of Wi-Fi, I-beams and smooth sensors for traffic and utility management etc, which would underpin the promotion of the SW as a technologically advanced region and develop the Cork smart gateway project.	South West Local Authorities, HEIs, Tyndall, Business Representative Bodies, Nimbus at CIT and Tyndall Institute at UCC
		Q1 2016

125	Develop two pilot “living labs” to test bed software and hardware for a Smart region, building on the initiatives underway in Mallow in Cork and in Kerry.	Q1 2016	South West Local Authorities, HEIs
-----	---	---------	------------------------------------

The Health Innovation Hub (HIH) Demonstrator project, a Government supported initiative under APJ 2013, drives collaboration between the health system and enterprises leading to the commercialisation of new healthcare technologies, products and services. There is strong momentum in the region in developing healthcare solutions based on the success of the Health Innovation Hub and it is important that the partners involved in the pilot sustain their collaborative approach into the future, so as to benefit patient care and encourage innovation.

South West Health Hub			
126	Develop a Health Technology & Innovation Cluster Strategy, centered at Cork University Hospital to place innovative teaching and research at the heart of healthcare delivery by providing facilities to promote collaborative working and develop and implement new solutions for healthcare challenges. Build on the success of the demonstrator Health Innovation Hub at UCC’s Western Gateway Building linked with the HSE South Hospital Group Region (includes Tralee, Cork and Waterford) and the Clinical Research Facility at the Mercy Hospital. Industry engagement and promotion of this initiative is critical in raising Ireland’s reputation as a centre of excellence in translation of research. By combining the needs of clinicians, scientists, engineers, researchers and teachers and creating a cluster in a single facility, daily professional interaction will focus on improvements in patient care.	Q1 2016	UCC, HEIs, HSE, South West Local Authorities, EI, IDA, Business Representative Bodies
127	Strengthen collaboration to fully exploit the success of the pilot Health Innovation Hub.	Q1 2016	HSE, UCC, Business Representative Bodies, Industry

There are strong and developing links between the South West and provinces in China that offer future potential for collaboration and growth. For example, Cork city has a developed strong links with Shanghai, Hangzhou, Wuxi and Shenzhen. There is an investment fund mooted with Shanghai Chamber. There are also exchange programme for students established, with 12 schools in Cork twinned with China for example. There is also €200,000 of funding for Confucius Institute from the Chinese Government annually. There are also now five Chinese companies in Cork. The potential is there to develop strong links between the SW and Lower Yangtze River region more generally.

Kerry has a MOU in place with the Zhejiang Province since May 2013 and ITT also have an MOU in place with Zhejiang University of Science and Technology (ZUST) in Hangzhou. Six Kerry Secondary School have formal links with compatible schools in Zhejiang.

South West Ireland– China Collaboration			
128	<p>Develop specific projects for local authority cooperation, enterprise cluster collaboration and educational exchange between the South West region and key provinces of China, in particular Shanghai and Lower Yangtze River region to promote exports and trade.</p>	Q4 2015	<p>South West Local Authorities, Cork Chamber, Zhejiang Province & partners, HEIs</p>

7. Branding and Marketing the South West Region

There are over 250 European regions benchmarked on the European Commission's regional economic databank – and in the case of the SW it is included in the broader Southern and Eastern Region. Being distinctive and developing a clear set of messages that can differentiate and position 'Ireland South West' as a truly global innovative region of scale with leading clusters of high-tech enterprises is both a challenge and an opportunity. While both Cork and Kerry have strong brands in their own rights, a number of initiatives are already underway in the region that can be built upon to create a value proposition for the SW City-Region.

The consultations with stakeholders have identified a number of proposals and initiatives at county and regional level. The Cork Strategic Messaging and Branding project has produced the Cork Brand Book and which addresses economic development, education, quality of life so as to attract and retain talented people and visitors. A critical aspect of any value proposition development involves being clear about what the proposition for the region is – how would the SW describe itself to the outside world? What would it like to be known for?

Another important aspect for all the stakeholders in the region is having a clear understanding and being able to identify the relevant target groups; identifying their needs and clearly articulated the value proposition of what the South West Region can offer each target group through a continuous targeted marketing programme. Key target groups include tourists (including holidays, short trips, conference and incentive specialist activities, festivals and events, etc.); FDI and Global Entrepreneurs (attracting new companies to the region); Skills (as well as upskilling the existing workforce, regions that can successfully attract skills from outside their regions will ultimately be more successful in meeting the skills needs of industry particularly in sectors where there is a global skills shortage), the Diaspora and Non-traditional foreign direct investment such as asset led investment, property investment, opportunities from natural resources in the region, etc..

Within the region from a tourism perspective there are a number of high-profile visitor branded products, Killarney National Park, Ring of Kerry, Blarney Stone, Cork City, The Titanic Experience in Cobh etc. However, the connectedness needs to be improved between these products to present a coherent overall message for the SW. Branding for the region is challenging as two strong Fáilte Ireland brands exist – Wild Atlantic Way and Ireland's Ancient East, together with the strong tourism brands of Kerry and Cork.

Within the region there are a number of high-profile visitor branded products, Ring of Kerry, Blarney Stone, Cork City, The Titanic Experience in Cobh etc. but the connectedness needs to be improved between these products to present a coherent overall message for the SW. Branding for the region is challenging as two strong Fáilte Ireland brands exist – Wild Atlantic Way and Ireland's Ancient East, together with the strong tourism brands of Kerry and Cork.

The Cork Tourism Strategy Group is also developing the Cork Tourism Brand proposition with Fáilte Ireland and Tourism Ireland. Both of these will be supported by stakeholders and developed as specific actions. In the case of Kerry, there are brand propositions already in place. As a next step, once the Cork Tourism strategy is finalised, an overarching initiative to pull the key strategic messages from Cork and Kerry together should be developed as an overarching SW proposition underpinning each other's strengths. Such a coherent approach would contribute to growth and job creation by seeking to increase understanding of the assets of the region, using our FDI expats to spread the word amongst their peers, families and colleagues to visit and see what is here and hopefully to start a new business here, and effectively integrate with tourism promotion to emphasise the region for the visitor experience and as a great place to live, work and play (food, craft, tourism services, a great place to live).

There is a growing awareness about the importance of having strong local economies that provide resilience and richness to the economic landscape. However, in order for strong local economies, or ‘hyperlocal’ as more recently coming to be defined in terms of local communities working together, to flourish and contribute to the creation of jobs at regional level. This requires capability building at local level and business representative bodies also have a role in this regard. The competitive call for proposals for Community Enterprise Initiatives can have a role to play in support of such initiatives, where there is demonstrated additionality and sustainability.

Diaspora

There is an opportunity for SW region to reach out to its diaspora to create value to (i) attract FDI jobs (ii) support local jobs (iii) support cultural awareness and activities (iv) promote educational exchange activities and initiatives, and (v) deliver international conferences and events to the region.

Counties Cork and Kerry will fully exploit the potential of the Government initiatives in this area.

Actions

Value Proposition and Diaspora			
129	Develop an overarching brand and value proposition for the South West, building on the strengths of the Cork and Kerry brands to reinforce each other and build awareness of all that the connected region has to offer.	Q2 2016	South West Local Authorities, IDA, EI, Fáilte Ireland, Chambers, enterprise bodies.
130	Further develop Diaspora networks in both Cork and Kerry with clear objectives and deliverables in the areas of trade promotion, attracting investment and advice and support to entrepreneurs.	Q4 2015	South West Local Authorities, HEIs, Chambers
131	Aligned with the proposed value proposition initiative, tailor ‘quality of life’ communications directed primarily at our Diaspora to equip them with up-to-date information to ‘sell’ the region as a good place to live and work.	Q4 2015	South West Local Authorities, HEIs, Chambers, ConnectIreland, Cork Foundation

8. Driving Entrepreneurship

The Government's 2014 National Entrepreneurship Policy Statement set an objective to increase the number of startups by 25 per cent and to increase the scaling and survival of startups by a similar number of over the next five years.

The consultations with stakeholders for this Action Plan agreed that the South West region had the potential to achieve the 25 per cent increase and should aim to perform at a level above this national average. Indeed there was a strong view that the region could significantly increase the number of startups and HPSUs over the coming years and increase the quality and survival rate of companies emerging from existing incubators and programmes.

The Local Enterprise Offices in the region are the designated first shop for entrepreneurs and micro companies in the region and work in very close cooperation with EI, playing a central role in promoting and ensuring the coherence and 'fit' of actions to support entrepreneurship across all stakeholders in the region. The Startup Gathering in autumn 2015, being delivered through collaboration between private and public sector bodies, also provides an opportunity to bring profile and prominence to the opportunities for entrepreneurship in the region. Centred in Cork for 2015, there is potential for a range of initiatives throughout Cork and Kerry to leverage off the Gathering at national level.

Areas with further potential to grow the number of entrepreneurs in the South West include female entrepreneurship in Science, Technology and Engineering related areas, to encourage more young entrepreneurs and startups and more minority and immigrant entrepreneurs. Building strong leadership and management teams for technology-driven University Spin-outs is a key scaling and internationalisation requirement also. Identification, attraction and engagement of skilled and experienced business leaders in and to the region and leveraging international networks to support such companies can support this as would the establishment of sectoral business partner/entrepreneur panels dedicated to supporting specific research centres.

Campus based startup incubation programs such as Gateway UCC have the potential to articulate and promote opportunities in this regard and to systematically engage with business promoters and business support networks in the region. There is potential to further promote the SW startup image abroad, as happened through collaboration with ITLG, and grow the startup network in the region.

Tyndall National Institute as the National Institute for ICT at UCC represents one of the best place in the country to incubate startup companies in the hardware sector both spin-out and spin-in. Enterprise Ireland has funded an incubation centre, the Prospect Innovation Centre: Lee Mills House in Tyndall for this purpose.

Startup companies need finance to grow and create employment and there are some initiatives set out in this regard below. There is identified potential for financial institutions to extend their services and knowledge of the startup environment, so as to ensure that the full range of funding opportunities is available to entrepreneurs, linking with the LEOs in the region.

There is also a need to focus on linking foreign owned multinationals and startups so as to provide opportunities for growth, to technology know-how and skills, with spill overs for the local economy. There is also a need to renew existing businesses and maintain employment; initiatives such as PLATO play an important role in this regard as are initiatives by the public service in purchasing more products and services locally.

Stakeholders are also proposing initiatives to help startups to scale and grow, take fear out of moving from ideas to businesses and to show what skills are available in the region. There is also

potential identified to greatly increase business between local companies, facilitate exchange of employees and supply of skill sets on a short term basis

The role of the education system also featured strongly in the consultations, in particular through the introduction of entrepreneurship modules and ensuring young people develop an understanding so they can take an informed step towards self-employment if desired. It is also proposed to support young people to explore the potential to employ themselves or others on graduation (or before), through for example the UCC IGNITE Graduate Business Innovation program, undergraduate entrepreneurship mentoring, use of facilities over the summer period in HEIs, as is the case in CIT and UCC and even if participants do not set up a new business at the end of summer, they will have learned skills that can be used in their future careers.

The Student Inc. programme which runs in CIT during the summer period has, since 2011, enabled the establishment of 19 businesses, 8 of which are still in operation and employing 26 people. The average cost per job is €5,400, reduced to €3,600 per job once benefit in kind is removed. This has been almost entirely funded by CIT.

Increasing awareness of supports available is also a theme of the actions proposed, with the objective of increasing the use and drawdown of funding and programmes and increasing market access for new and existing companies.

Information sharing and peer-to-peer networks are also proposed with the objectives of enthusing people locally, disseminating information, educating, showcasing, building and supporting local enterprise through entrepreneurs that are supported and can create sustainable jobs with a foundation based on naturally available opportunities and synergies as is the case of the Kerry Enterprise month.

Linked to tourism there are also identified opportunities in areas such as the Wild Atlantic Way and the potential to develop new services to meet visitor demand resulting in more visitors coming to the area, spending more, expanding the season and helping localities.

Community Enterprise Centres and Incubators are also an important part of the startup ecosystem and there are proposals for increasing use of existing centres and their expansion. Greenshoots at Macroom is an example of a local initiative with a proven track record of strengthening startups chance of survival, with 90 jobs created to date. Creating urban hubs in Cork and larger towns are also seen as important so that young people can network, develop new ideas, do startup boot camps with peer group and from startup teams. Also, CIT's Rubicon Centre – funded jointly through CIT and Enterprise Ireland, is one of Ireland's largest and most successful incubators. Since the Rubicon started in 2006, the Centre has assisted 400 startup companies who between them now employ 2500 people. The survival rate of companies assisted - after 5 years - is 70%. Its supportive programmes, New Frontiers, PINC and Exxcel, have been hugely successful in terms of supporting and driving new startups.

Driven by the IMERC Partners, CIT, the Irish Naval Service and UCC, The Entrepreneur Ship, based in Ringaskiddy is Ireland's only dedicated innovation hub for startups and touch down companies in the maritime and energy space. It comprises of office space with 25 desk spaces hosting a mix of entrepreneurs and internationally established companies embedded in a network of support agencies, the Irish Naval Service, investors, world class test bed facilities and research excellence.

These initiatives are in line with the objectives of national policy, and as set out in the National Entrepreneurship Strategy to:

- Make Ireland a location of choice for high quality international startups;

- Develop the infrastructure to support technology transfer into commercialisation as a new business opportunity (Knowledge Transfer Ireland; Campus Incubators; Commercialisation Fund; Technology Centres); and,
- Develop a support framework where innovative startups can reach their full potential.

The range of supports and services include funding including feasibility and competitive start funds, mentoring, Start-Your-Own business courses, the Enterprise Ireland New Frontiers Programme, Enterprise Ireland Business Partners Programme, incubation spaces and advisory services. The key development agency supported initiatives are set out in Appendix B.

CORKBIC is a leading interdisciplinary venture consultancy operating in the South & Mid-West of Ireland with the support of Enterprise Ireland. The company has provided an integrated process for incubating and growing high potential technology companies over the last 25 years with an 85% success rate. CORKBIC manages The Business Angel Network (HBAN) in its region - a joint initiative between Enterprise Ireland, InterTrade Ireland and the Irish Business Innovation Centres (BICs). The HBAN operates on a regional basis, providing a matching service for private investors (Business Angels) and pre-screened investment opportunities in startup, early stage and developing businesses. The angel network recently completed its 100th investment deal resulting in investments of €40 million into a cross section of indigenous Irish companies

ETBI has developed MOU / Protocols with Local Enterprise Offices. To support this work in Kerry the ETB is planning to further strengthen its focus on entrepreneurship starting with Youth Entrepreneurship at second level schools and also by integrating entrepreneurship modules and projects into appropriate FET provision. Equally this demands school based and adult focused education and career guidance supports people to consider entrepreneurship as a career choice and highlights opportunities in this area to parents of secondary school students. Given the changing nature of the world of work and the fact that so many people during the recession had to either upskill or change career direction Kerry ETB has added provision in courses such as Project Management so that people can develop transferrable skills that complement their current core qualifications.

Proposed Actions

- Raising awareness of the range and nature of supports available;
- Stimulating entrepreneurship through the lead agencies of LA-LEO's and EI / starting your own business as an alternative career (employment) option [includes schools/ HEIs / Roadshows]
- Developing 'platforms' for experience sharing and networking
- Develop accelerator / incubation / co-working property and advisory services solutions throughout the region – ensuring a collaborative and cohesive approach to service delivery across all providers
- Funding
- Supporting entrepreneurship in the regional towns via the community Enterprise Centres

Actions

Entrepreneurship and Startups

132	<p>Each of the Local Enterprise Offices in the South West region will aim to increase employment in its baseline through increased startups and scaling of existing clients. Annual Business Plans setting out clear targets and objectives across a range of services and for 2015 these include:</p> <ul style="list-style-type: none"> • €2.098 million will be available in grant assistance and enterprise development supports; • 33 Start Your Own Business courses run, for up to 470 participants; • 305 one-to-one mentoring assignments will be arranged; • 33 MicroFinance Ireland applications; • Over 1,400 female entrepreneurs to avail of LEO training and soft support programmes; • 88 schools to engage with the Student Enterprise Programme, with over 3,260 participants. 	Q4 2015	LEOs
133	Enterprise Ireland will agree and implement a Services Level Agreement with all Business Innovation Centres (BIC) including with Cork BIC to ensure their interaction with startups in the South West region is deepened and the value maximised.	Q4 2015	EI
134	In line with the National Action Plan for Jobs 2015, Enterprise Ireland will assess the potential for enhancing the accelerator environment nationally	Q4 2016	EI
135	Promote the Startup Week in Cork and Kerry Enterprise Month as a regional event for the South West, with the key objective of bringing entrepreneurs and startups to together to develop contacts.	Q3 2015	ITT, South West Local Authorities, EI, LEOs
136	Enterprise Ireland and LA-LEO's will drive and encourage entrepreneurship in the South-West Region. Initiatives will include two Enterprise Start workshops, the Kerry Enterprise Month, and a Competitive Feasibility Fund.	Q4 2016	EI, KCC, LEO
137	Enterprise Ireland will run a Competitive Feasibility Fund call for Cork in 2016	Q4 2016	EI
138	Enterprise Ireland will run a Competitive Feasibility Fund for Kerry as part of a regional call in 2015	Q4 2015	EI
139	Údarás na Gaeltachta will target the creation of 345 new jobs in the South West region over the next three years.	2015-2017	ÚnaG

140	Údarás na Gaeltachta will develop annual enterprise development plans for each Gaeltacht area setting out targets to support entrepreneurship, enterprise growth and job creation.	Q4 2015	ÚnaG
141	Údarás na Gaeltachta will implement measures to support early stage business with a particular focus on regional competitive advantage in specific sectors, including cultural tourism, audio-visual and digital technology, marine resources, niche manufacturing, food beverages and creative language-based services.	Q2 2016	ÚnaG
142	Údarás na Gaeltachta will provide support for 5 high potential food and drinks companies in the region to expand their operations.	Q4 2016	ÚnaG
143	Údarás na Gaeltachta will develop an internationalisation programme aimed at SME's operating in minority language areas in the region in partnership with a Welsh Development Agency.	Q3 2016	ÚnaG
144	Enterprise Ireland will implement the findings from the review of the New Frontiers Entrepreneurial Development Programme in <u>(subject to approval)</u> order to evolve the programme to maximise its positive impacts on entrepreneurship in the region. Both CIT and IT Tralee are leaders in the provision of the Programme. EI will to work closely with both. Actively promote Ignite, Gateway UCC and Rubicon and New Frontier programmes supports for startups	Q4 2015	EI, HEIs, LEOs
145	<p>Increase student entrepreneurship in the region through:</p> <ul style="list-style-type: none"> • Increased availability of entrepreneurship modules for all HE and FE students, including interdisciplinary modules where business students can work in teams with science and engineering students; • Increased summer entrepreneurship opportunities for HE and FE students such as the Student Inc programme at CIT or the Indie.Bio Synthetic Biology Accelerator program at UCC; • Provide student placements in incubators or in emerging new businesses. <p>Supports for these actions will be made available via the use of entrepreneurs to give advice to students, provision of opportunities to explore business ideas, as well as training, mentoring, seed funding, office space and networking.</p>	Q4 2016	HEIs, ETBs, LEOs

146	<p>Youth Entrepreneurship – Enterprise Camp. This initiative started by the School of Business in CIT is now in its fourth year bringing in 25 young entrepreneurs each year, who learn entrepreneurial skills over a 5 day period. The programme since its inception has been over-subscribed and CIT is currently planning to expand the programme. The programme is free and open to students aged 14-16 Years old in Cork City and County Schools who are enthusiastic, motivated and interested in learning more about starting their own business.</p> <p>www.cit.ie/enterprisecamp</p>	Q4 2016	CIT/LEOs/ETBs/HEIs
147	<p>EI will organise and run three "Project Assessment & Development Days" for entrepreneurs and Startups based on the South-West in conjunction with Cork BIC and EI HPSUs teams to assess early stage startup projects with potential for growth (HPSU).</p>	Q4 2016	EI
148	<p>Enterprise Ireland will run one "Startup Open Days & Clinics" in the South West where newly registered Startups in Manufacturing and Internationally Traded Services from the region are targeted and invited to open-days "clinics" (EI Regions/HPSU/Local LEO). At these events companies can be signposted to the various supports available regionally and nationally.</p>	Q4 2015	EI, LEOs
149	<p>Financial institutions to work with EI and LEOs on startup seminars with a sectoral focus. This should be a type of roadshow event travelling to different locations within the region. These seminars will incorporate various elements e.g. finance, marketing, showcasing synergies and success stories, potential for collaboration, sectoral supports and current opportunities.</p>	Q2 2016	Financial Institutions, EI, LEOs, Ibec, Chambers
150	<p>Develop a strategy for Female Entrepreneurship in STEM programme based on the evaluation of the pilot run in CIT and extend the programme to include IT Tralee</p>	Q3 2015	Rubicon, EI, Tom Crean Business Incubation Centre, IT Tralee
151	<p>Expand the PINC Programme for female entrepreneurship which, since 2011 has facilitated the creation of 99 jobs across Cork City and County.</p>	Q2 2016	CIT, ETBs, LEOs
152	<p>Enterprise Ireland will hold an International Female Entrepreneurship conference in the region to coincide with the Rose of Tralee Festival</p>	Q3 2015	EI and Rose of Tralee
153	<p>88 secondary schools in the region to be engaged in an active way on entrepreneurship over 2015 / 2016 academic year.</p>	Q2 2016	LEOs, ETBs
Incubators			
154	<p>Develop more co-working spaces in the region, using community and other enterprise facilities.</p>	Q3 2015	LAs, ETBs, EI, LEOs

155	Enterprise Ireland will roll out nationally the €5 million Community Enterprise Initiative Scheme launched in May 2015 and will highlight to key stakeholders in areas where the Initiative might have a significant potential Impact or where there are gaps in the provision of CECs.	Q3 2015	EI
156	Promote the potential for greater use on non-urban incubator space and examine synergies with the region's accelerator programmes	Q2 2016	South West Local Authorities, EI, HEIs, ETBs LEOs
157	Network the Community Enterprise Centre assets of the region with the Incubator and Accelerator Programmes within the region, to both allow greater numbers of participants engage with these programmes and to encourage placement of these innovative ideas throughout the region and not just in the higher population centred facilities.	Q4 2015	EI, HEIs, NACEC, South West Local Authorities, LEOs
158	Support the development of The IMERC Entrepreneurship to facilitate the growth of the region's maritime and energy economy.	Q4 2016	IMERC Partners (UCC, CIT, Irish Naval Service), EI, South West Local Authorities, LEOs

9. Building Enterprise Capability and Connections

The enterprise base of the South West region has a range of strengths in terms of export orientation, innovativeness and diversity, but a range of challenges remain to boost the resilience and sustainability of the enterprise economy for the future.

The consultation with stakeholders identified a range of areas for collaboration among enterprises in the region, in particular in the areas of scaling and growing enterprise, mentoring, growing exports, increasing all-island trade and deepening SME-MNC links.

There were strong views that connecting foreign and Irish owned MNCs and SMEs more effectively can help to bring the local companies up to international best practice in terms of management practice to create competitive advantage. Improving relationships can also lead to potential around supply chain for the internal manufacturing market. MNC-SME linkages can also help develop the skill and expertise in SMEs. There was a view that many MNCs source products from abroad unaware of the opportunities on their doorstep. There was broad agreement that sourcing locally would create further jobs.

In relation to mentoring there was a strong view that there are already a lot of good supports available, but that people / business are not necessarily aware. The recent DJEI Mentor Evaluation suggested a proactive approach be taken by LEOs to ‘target’ more established small enterprise to stimulate interest in and engagement in mentor services. There is also a strong role for private sector bodies to support such networks. The objectives of the APJ 2015 in relation to building enterprise capability include developing the management capability of Irish enterprises; encouraging greater adoption of ICT to enhance firm level productivity and promoting greater adoption of lean. Among the key actions to be progressed as set out below include mentoring for SME’s and promoting greater Inter-firm linkages and sub-supply opportunities.

Actions

Scaling and Growing Enterprise			
159	Expand peer-to-peer groups of owners of family businesses/SMEs to develop alternative management structures/ownership models for the next stage of growth.	Q4 2015	Plato Business Network, EI, LEOs, South West Local Authorities, HEIs
160	Support the development of early-stage ICT businesses by establishing mentorship and support programmes involving more established entities. Launch two Dealstart initiatives to provide a platform for SME’s to get that first deal or reference site from MNCs.	Q2 2016	IT@cork, relevant Kerry institutions, Dealstart, EI

161	<p>Cork Institute of Technology will host cluster development managers from ACCIÓ (Catalan Agency for Competitiveness) and Business Upper Austria (Linz, Austria) to run four targeted workshops which focus on the needs and requirements of each of the elements of the triple helix;</p> <ol style="list-style-type: none"> 1. Individual SMEs and MNCs across the South West region seeking to develop collaborative linkages in Spain and Austria. 2. Existing and emerging cluster organisations development needs. 3. Local government, policy makers and the development organisations. 4. Academic practitioners of clustering theory. <p>The purpose of these workshops is to perform an internal analysis of the structures and resources required to develop thematic clusters where the South West has strengths to support job creation in the region.</p>	Q3 2015	CIT, South West Local Authorities
Mentoring			
162	Implement the National Mentoring Strategy through the provision of one-to-one mentoring services and support for peer and voluntary networks as part of the regional Competitive call for proposals for Community Enterprise Initiatives	Q4 2015	EI, LEOs, DJEI
163	IMDA to expand its HPSU and cross sectorial lean mentoring programmes established in 2014 and 2015 respectively, aimed at raising the bar with respect to manufacturing.	Q4 2015	IMDA, EI
Growing Exports			
164	Promote the use of EI 'hotdesk' facilities in overseas markets to businesses in the region.	Q2 2016	EI
165	Increase use of Enterprise Ireland's main Market Research Centre and each of its regionally based "Market Research Hubs" including those located in Tralee and Cork for pre-exporting regionally based companies seeking to research new international markets locally.	Q4 2015	EI
166	Develop export market networking groups to learn from peer-to-peer exchanges in key markets, including emerging markets and promote awareness of export networks of businesses.	Q2 2016	Chambers, Ibec, Irish Exporters Association, EI

Cross Border Trade- First time Exporters			
167	InterTrade Ireland will promote its Acumen and Elevate programmes providing financial assistance to local companies to investigate and pursue export opportunities in Northern Ireland.	Ongoing	ITI
Accessing International Markets			
168	Roll-out further EI Export Workshops and Export Awareness events in the region.	2016	EI
169	InterTrade Ireland will promote cross border trade opportunities to small business in the region.	Ongoing	ITI
170	Through its Trade Accelerator Voucher scheme InterTrade Ireland will help companies to identify and break down barriers to trade leading to new export opportunities in Northern Ireland.	Ongoing	ITI
SME- MNC Links			
171	As part of the new EI/IDA Global Sourcing initiative in the South West region, the agencies ensure all new investors are aware of the supply strengths in the region and targeted programmes with large multinationals in the region. The objective is to increase collaboration between existing EI and IDA clients with a focus on increasing local and global sourcing opportunities for indigenous firms and to encourage SMEs and MNCs to collaborate to supply imported products and services.	Q3 2015	EI, IDA, Ibec, Chambers

10. Fostering Innovation

The focus of this section is on increasing the innovation performance and dynamic of the South West Region. The region has a strong presence of public research institutions and private sector enterprises that are active in research and innovation. The objectives of the actions set out below are to strengthen the links and collaboration between the public and private sectors so as to increase exports and success in international markets and to increase success in international research funding programmes such as the EU's H2020 programme.

Under the auspices of an Inter-departmental Committee, DJEI is developing a successor to the Strategy for Science, Technology and Innovation (SSTI) and the actions set out below will be aligned with the key thrusts of the successor SSTI.

There is also a need for a radical shift in focus on supporting commercialisation of research and measures to ensure that companies do not fail because of lack of business expertise and early stage seed funding.

While research institutes, such as the Tyndall Institute and Teagasc, have extensive experience in winning international research funding, many SMEs do not have that experience and see it as daunting to apply. The consultations identified the potential for research institutes to work with SMEs to increase their success in such international programmes, such as for H2020 funding and actions in this regard are set out below.

There are also clusters of innovation, which if better connected could accelerate the rate of new products/services development.

IDA Ireland and Enterprise Ireland both have key objectives of increasing Research Development and Innovation (RD&I) across their respective client base by providing supports and incentives for approved projects. Some of the key innovation assets of the region are set out below.

Incubation Space

- **The Rubicon Centre**, opened in 2006 and funded jointly from CIT and Enterprise Ireland. One of Ireland's largest and most successful on-campus business incubators, the Rubicon works closely with CIT's research community and the two Technology Gateways (CAPP and TEC) to develop new business. A range of programmes is offered, including the very successful New Frontiers and the Exxcel programme, aimed at female entrepreneurs in the STEM disciplines.
- **Tom Crean Centre**. Enterprise Ireland has provided over €2m in capital as well as other supports for the development of Incubation facilities at the Institute of Technology Tralee.
- The Killarney Technology Innovation Centre (KTI) provides business incubator, research and training space for ICT related enterprises and activities. The Centre has Eircom fibre optic links to enable high-speed data transfer and Internet access bringing it to its present size of over 14,000 sq. ft. It contains an Outreach Centre from the Institute of Technology Tralee, enabling easy access to ITT's research facilities and technical expertise, as well as an ETB IT Training Unit, which provides high quality IT training.
- **Tyndall National Institute as the National Institute for ICT at UCC** represents the best place in the country to incubate startup companies in the hardware sector both spin-out and spin-in. Enterprise Ireland has funded an incubation centre (The Prospect Innovation Centre: Lee Mills House) in Tyndall for this purpose. Tyndall is very experienced in engaging SME's in European programs. During Framework 7 Tyndall supported Irish SME's in obtaining €10m funding for their research. Already in H2020 in addition to €7.45m brought to Tyndall, funded projects

delivered €2.86m to other Irish partners of which €1.26 went to Industry (38% on top of Tyndall's draw down compared to 26% in FP7). Tyndall has a dedicated staff focussed on consortia building and application for H2020 projects.

- **UCC Incubation Space.** Enterprise Ireland has supported University College Cork's three sets of Incubation Units. These units are in the areas of Lifesciences/Biotech and ICT, and are comprised as follows:
 - Western Gateway Building (IT) has 10 units of office space (including 8 hot-desk positions) approx. 480sq.m. will be dedicated to the Incubation Centre.
 - Bio-Innovation Unit Food Science Building (Life Sciences) has 4 Units with office and wet lab capability approx. 400sq.m. including shared preparation area.
 - Tyndall National Institute Prospect Innovation Centre (ICT) at Lee Mills House, Prospect Row, UCC Lee Maltings Complex, Cork. 7 Units of office space approx. 200 sq. m. (including 6 hot-desk positions).
- Driven by the IMERC Partners, CIT, the Irish Naval Service and UCC, The Entrepreneur Ship in Ringaskiddy is Ireland's only dedicated innovation hub for startups and touch down companies in the maritime and energy space. It comprises of office space with 25 desk spaces hosting a mix of entrepreneurs and internationally established companies embedded in a network of support agencies, the Irish Naval Service, investors, world class test bed facilities and research excellence.

Research

The education institutions in the region also have a role to play in the development of clusters.

UCC as a research –led university is ranked in the top 2% of universities worldwide and is a key driver of economic growth in the region:

- As one of the largest employers in the region, the impact on the economy both directly and indirectly is very substantial. The growth in internationalisation of the university with increasingly diverse student cohorts, has a particular benefit to the region in terms of the indirect impact on business;
- The graduates and postgraduates emanating from the university including highly qualified PhD graduates both local and attracted to the region through leading research centres at UCC, including Tyndall, APC, ERI etc are a key driver for economic growth especially in R&D active employers;
- Partnership and collaboration with external stakeholders including industry , development agencies etc is a daily feature of the research teams across the university campus, linking the university research community with diverse stakeholders across the region. For companies collaborative research programmes underpin internal R&D programmes providing access to state of the art infrastructure. UCC's success in the SFE Research Centres programme, the largest ever combined state- industry investment in research highlights the well-developed tradition to effective and in depth engagement with industry partners which underpins the research centres across the university;
- The university acts as a catalyst linking its stakeholders in the region to global research and knowledge, disseminating leading developments to different stakeholders in the region;
- The peer reviewed research income within the University typically >€80m per annum represents the largest expenditure on research in the region;

- As coordinators of the Technology transfer initiative which includes CIT and Teagasc, UCC plays a leading role in commercialisation of research in the region; and
- While UCC interacts in the region it is also active nationally and internationally and thereby is one of the most effective conduits linking the region to the globe.

Research Centres in the region where companies and individuals can cooperate or engage on key issues or research projects and recruit trained researchers include:

UCC Research Centres

- **Tyndall National Institute (TNI).** TNI is one of Europe's leading centres for Information, Communications and Technology (ICT) research and with 460 researchers is the largest research facility of its type in Ireland. TNI is also a globally leading Institute in its four core research areas of Photonics, Micro/Nanoelectronics, Microsystems and Theory, Modelling & Design, and has network of 200 industry partners and customers worldwide. TNI hosts the SFI-funded Irish Photonics Integration Centre (IPIC), CCAN, MCCI and IERC.
- **National Centre for Data Analytics (INSIGHT).** INSIGHT's research encompasses a broad range of data analytics technologies and challenges, from machine learning, decision analytics and social network analysis to linked data, recommender systems and the sensor web. Together with 30 partner companies, INSIGHT researchers are solving critical challenges in the areas of Connected Health (including chronic disease management and personal sensing) and the Discovery Economy. Participating universities include UCC, UCD, NUIG, & DCU.
- **Microelectronic Circuits Centre Ireland (MCCI).** Located at Tyndall Institute, the MCCI is a national industry-led research centre focused on world-class Analogue, MS and RF circuits. Currently MCCI has 3 main research areas each with a strong Digitally-Assisted-Analogue emphasis including Power Management, High Speed Transceivers & Data-converters.
- **Irish Photonic Integration Centre (IPIC).** The new €30million Irish Photonic Integration Centre (IPIC) is a Science Foundation Ireland (SFI) Research Centre that brings together over 100 researchers from four institutes to develop new light-enabled technologies. Targeting the ICT and medical devices sectors, IPIC is working with 18 industry partners to develop the next generation of highly-compact and miniaturised photonic technologies. The Centre's work is focused on revolutionising the speed of data transfer through faster more energy efficient devices and delivering new smart medical devices for improved diagnosis and treatment of disease. IPIC is led by Tyndall National Institute in collaboration with University College Cork (UCC), Cork Institute of Technology (CIT) and Dublin City University (DCU).
- **Boole Centre for Research in Informatics (BCRI).** BCRI undertakes interdisciplinary research in mathematical sciences and computer science, and is a leading European research centre that addresses major fundamental topics in the area of Informatics, including Information Theory, the Theory of Computation, and Computing Paradigms.
- **The Centre for Efficiency Oriented Languages.** CEOL focuses on improvements in static and dynamic analysis of software/hardware systems. Average-case analysis has applications in (soft) real-time applications, resource budgeting and power optimization. The foundation of the approach lies in a combination of several areas: analysis of algorithms, data structure operations and complexity theory.
- **Collaborative Centre for Applied nanotechnology (CCAN).** CCAN is an industry-led, collaborative, applied research centre enabling companies and University researchers to work together to develop nanotechnology-enabled products and solutions for the ICT and biomedical industries. The adoption of open innovation approach leads to faster project

delivery and a more efficient journey from an industry-defined problem to a nano-enabled solution.

- **Alimentary Pharmabiotic Centre (APC).** APC, in association with Teagasc, is a national centre for food and medicine funded by government and industry through Science Foundation Ireland's Research Centres' programme. The centre spans across UCC, Teagasc (Ireland's Agriculture & Food Development Authority) and Cork Institute of Technology. APC supports world-class research into how bacteria in the human gut impacts on population health, leading to the development of future foods and medicines.
- **Food For Health Ireland (FHI).** Established in 2008, Food for Health Ireland (FHI) is one of the biggest technology centres in Ireland and its purpose is to identify novel ingredients coming from milk to develop functional food ingredients which will offer health benefits to consumers. Its vision is to be a leading global innovation centre for the development of nutritional functional ingredients for improved health, wellness and quality of life. The research is focusing on infant nutrition, healthy cheese, appetite modulation, performance nutrition and healthy ageing as well as products that can be used to manage elevated glucose levels. FHI has a multidisciplinary team of 75 scientists. This includes experts in 7 major Irish public research organisations (UCD, UL, DCU, UCC, NUI Maynooth, NUI Galway and Teagasc), and a management team based in University College Dublin. FHI entered its second phase of research in September 2013 and through Enterprise Ireland €16M will be invested, with the remaining €5M being provided by the companies involved in the research centre; Carbery, Dairygold, Glanbia, the Kerry Group, and Ornu.
- **Synthesis & Solid State Pharmaceutical Centre (SSPC).** Launched in July 2013, SSPC delivers relevant solutions that address the manufacturing needs of the pharmaceutical industry and in-turn lead next generation drug manufacture. Led by the University of Limerick and hosted in Cork by UCC's Analytical and Biological Chemistry Research Facility (ABCRF), the mission of the centre is to position Ireland as a global hub for process innovation and advanced manufacturing in the pharmaceutical industry. The SSPC supports over 250 active members, across academia and industry on a national and international basis.
- **Irish Centre for Foetal and Neonatal Translational Research (INFANT).** INFANT is a world-leading perinatal research centre and is the first such centre on the Island of Ireland. Founded upon over a decade of world-class collaborative research and a diverse array of national and international academic and industry partnerships, INFANT is now an international leader of discovery and innovation in perinatal healthcare.
- **Analytical and Biological Chemistry Research Facility (ABCRF).** ABCRF conducts world class, multidisciplinary research at the chemistry-biology interface, focused on pharmaceutical synthesis, separation and detection/characterization. The research strategy of the ABCRF focuses on bringing together interdisciplinary teams of researchers working in areas of Chemistry and Biochemistry relevant to the pharmaceutical sciences.
- **Centre for Research in Vascular Biology (CRVB).** CRVB addresses fundamental questions in vascular stem cell biology, atherosclerosis and vascular remodelling. A key goal of the centre is the translation of ideas to the clinical cardiology arena in areas of novel diagnostics and therapeutics in the field of stem cells, gene delivery and tissue engineering.
- **Cork Cancer Research Centre (CCRC).** CCRC investigates major issues in the development and treatment of cancer, through teams of university based scientists and collaborating clinicians at multiple teaching hospitals. The primary focus of the centre is on the development of new treatments for cancer that do not currently respond to conventional therapies, research that has already led to multiple clinical trials.

- **The Health innovation Hub.** The Health innovation Hub was successfully established as part of Action Plan for Jobs 2013, with the cooperation of the HSE and has 26 enterprises actively involved with the health sector on innovation projects and solutions development. The Health Innovation Hub is based at UCC, but represents a collaborative partnership which includes CIT and a range of hospitals and health professionals in the region.
- **The HRB Clinical Research Facility.** The HRB Clinical Research Facility Cork was established to promote excellence in the design, safe conduct and analysis of patient-focused research. It provides the necessary space, expertise and equipment to allow medical professionals in Munster to work at the very cutting edge of clinical research. The HRB CRF-C allows breakthroughs in laboratory research in drug food therapy, food supplementation and medical devices to be converted into better and safer treatments for patients in a timely and efficient fashion. It tests potential new patient therapies and compares the risks, benefits and cost effectiveness of established treatments. In conjunction with the UCC Department of Epidemiology, it supports studies that gather information and samples from patients with given conditions in order to better understand the causes and consequences of these illnesses. The Facility provides a gateway that allows local researchers to integrate with the research work of colleagues both nationally and internationally and to ensure that the most current advances in treatment are available in Cork. The HRB CRF-C supports research undertaken through UCC and affiliated hospitals, as well as in the primary care setting. It is funded by the HRB and is operated as a joint venture with UCC, CUH and MUH.
- **Governance, Risk & Compliance Technology Centre (GRCTC).** GRCTC is a multi-institutional, industry-led centre of excellence for innovation and research in semantic technologies for GRC in financial services. GRCTC's mission is to undertake business-focused research and development for the benefit its members and other stakeholders. Its objective is to provide innovative solutions, based on semantic technologies, to the GRC problems that confront the financial industry.
- **Financial Services Innovation Centre (FSIC).** FSIC provides a resource for global financial services companies to participate in cutting-edge innovation and development that will have global impact. The Centre also allows participants to share information and expertise, while also keeping abreast of the latest development in the financial services software market. Innovation is unpredictable and revolutionary, the Centre aims to reduce this uncertainty and exploit the power of innovation through the development of cutting edge software solutions.
- **Environmental Research Institute (ERI).** ERI is a flagship research Institute that carries out inter-disciplinary research in the broad Environmental, Marine and Energy area. With over 300 researchers drawn from across a diversity of scientific and engineering disciplines, the institute is focused on providing knowledge-based options to address major societal challenges and in developing and strengthening Ireland's leadership in eco-innovation and innovation in policy and governance.
- **Marine Renewable Energy Ireland (MaREI).** Led by UCC, MaREI is a cluster of key university and industrial partners dedicated to solving the main scientific, technological and socio-economic challenges related to marine renewable energy. These challenges require innovative solutions to reduce time to market and reduce costs to a competitive level. They cover all aspects of the technology development and require solutions to the engineering problems, energy conversion and storage transmission and integration as well as the enabling ICT technologies and environmental aspects. marei.ie
- **Beaufort Research.** Beaufort Research is dedicated to inter-disciplinary research and knowledge transfer supporting development and innovation in the maritime and energy fields. It combines the excellent track record of the Hydraulics and Maritime Research Centre

(HMRC), the Coastal and Marine Research Centre (CMRC) and the Sustainable Energy Research Group (SERG) at UCC. The maritime and sustainable energy activity comprises energy supply technologies, including the marine renewable energy sectors of wave, tidal and offshore wind, wind energy and biofuels.

- **International Energy Research Centre (IERC).** IERC is hosted at the Tyndall National Institute with the key objective of undertaking world-leading research in energy production, storage and conservation and creating innovative technologies which can be then commercially developed. The centre conducts research into integrated energy systems with particular emphasis on: Energy & Urban Infrastructures, Mobility Solutions, Integrated Electricity Systems, and Energy in Industry, Fuels and Energy Storage and Energy in Home Systems. Research topics such as Wireless Systems for Buildings, Power Conversion, and Intelligent Power Systems are also being undertaken.

CIT Research Centres

- Nimbus Centre for Embedded Systems Research - The [Nimbus Centre at CIT](#) is Ireland's largest 'Internet of Things' (IoT) research centre, devoted to the field of networked embedded electronic systems.
- Blackrock Castle Observatory Labs – Combining astrophysics with a publicly-accessible science outreach visitor centre, in partnership with Cork City Council.
- MEDIC - Medical Engineering Design and Innovation Centre. MEDIC brings together the full set of skills required to develop medical devices including an extensive network of clinicians, inventors, and industry partners. Ideas are taken from initial concept/idea stage through to regulatory approval and commercialisation via a strictly defined product development process (PDP).
- CAPPa – Centre for Advance Photonics and Process Analysis - conducting both applied and fundamental research on photonics for applications in areas as diverse as telecommunications, medical devices, food and pharmaceutical manufacturing. A number of CAPPa personnel are also co-located in the [Tyndall National Institute](#) under the [CIT@Tyndall](#) partnership.
- Bio-Explore
- Halpin Centre for Maritime Research, based at the National Maritime College of Ireland (NMCI).
- The Hincks Centre for Entrepreneurship Excellence was established in 2012 to promote research, education and training in the area of entrepreneurship.
- Art Therapy – CIT is the only higher education institution in Ireland which provides professional training and research in Art Therapy.

ITT Research Centres

- IMaR, Irish Mechatronic and RFID
- **Shannon ABC** offers expertise in bio-processing, extraction, purification and screening of products derived from a wide variety of natural products and waste streams, with a view to identifying bioactive substances of value to a wide spectrum of industries. Shannon ABC is a commercially focused, state of the art, research centre and is part of the nationwide network of 12 Technology Gateways core funded by Enterprise Ireland whose role is to deliver technology solutions through collaboration on projects which are close to the market needs of Irish industry. Shannon ABC has on-going and expanding programmes to explore natural products for novel bioactive substances of value to the healthcare, forensic, pharmaceutical,

food, cosmetics, agricultural, environmental and bio-energy industries. Shannon ABC is a collaborative research centre between IT Tralee and Limerick IT with research centres in both locations.

- The Centre for Entrepreneurship and Enterprise Development (CEED)
- Irish Academy of Hospitality and Tourism (IAHT)
- UNESCO Chair in Inclusive Physical Education, Sport and Fitness Recreation

Teagasc Moorepark

Moorepark, located on a 110 hectare campus in North Cork, is one of the world's leading dairy research centres and specialises in pasture-based systems of milk production. Its research focus is to anticipate the production needs of a rapidly changing industry and advance the competitive edge of Irish dairy farmers on the global market

The campus has a dedicated Food Research Centre, an extensive Animal and Grassland Research Facility, a Pig Production Development Facility and the pilot plant- Moorepark Technology Limited.

The Food Centre works in close collaboration with Bord Bia, Enterprise Ireland, industry partners and plans are well advanced with dairy stakeholders to develop a food innovation hub on the campus. It is envisaged that this unique food cluster will align the critical mass of resource intensive technology and instrumentation hardware and scientific expertise and feature intensive collaboration between companies and research centres.

Moorepark Technology Ltd. (MTL is a modern pilot plant facility containing versatile pre-commercial processing equipment offering a variety of services: pilot plant rental, technical training, contract R&D and pre-commercial manufacture. Infant milk formula (IMF) producers are a key customer. A €10m capital investment programme in capability development is approved to future proof the technology platforms, meet industry demands in relation to manufacturing standards and align systems and processes with commercial needs.

BIM

BIM is the state agency with primary responsibility for developing the Irish sea-fishing and aquaculture industries. It provides a range of advisory, financial, technical and training services to all sectors on the Irish seafood industry. One such facility is the Seafood Development Centre (SDC) which offers companies the opportunity to test and trial seafood innovative product and to process ideas in its test kitchen and incubation facilities, before committing to full commercialisation and capital investment costs.

Research links with other regions. The Atlantic University Alliance (AUA) is a consortium of three Universities on the Atlantic coast of Ireland - NUI, Galway, the University of Limerick and University College Cork. The AUA aims to pool the individual expertise and resources of its constituent Universities making them available through a number of joint projects in the area of training, education and R&D.

Innovation Vouchers

Innovation Vouchers give small companies access to the vast knowledge available in Irish Institutes of Technology, Universities and other public research bodies. These vouchers worth €5,000 can be used by the average small Irish company to bring in knowledge that is new to the company. Since 2007, EI has approved over 5,000 innovation vouchers to small companies. Between 2012 and 2015

(to date) over 330 Vouchers were approved to South West based companies. In 2014, €283,000 was paid to CIT for research work relating to 67 vouchers, while €63,000 was paid to ITT relating to relating to research work on 13 Innovation Vouchers. Since 2007, €965,000 was paid to UCC researchers related to 193 Innovation Vouchers.

Actions

Fostering Innovation			
172	Increase university/IoT commercialisation of research - translating it into jobs on the ground supporting the partnering with entrepreneurs/business championing and building strong business teams to succeed.	Ongoing	HEIs, UCC, Gateway UCC
173	Brand the opportunities that exist for global entrepreneurs/employees to base themselves in Cork and Kerry	Q4 2016	South West Local Authorities, Connect Ireland, IDA, EI
174	Enterprise Ireland will facilitate a Regional Innovation Forum to encourage peer to peer interactions and SME-HEI linkages to promote and showcase innovation (people, resources, training and research).	Q4 2015	EI, HEIs
175	Create more hot-desk facilities in vacant city centre units as this is where mobile young tech employees want to be based.	Q4 2016	South West Local Authorities
176	Investigate, subject to funding availability, the Development of a Research and Innovation centre in IT security/cloud computing building on UCC's involvement in the Irish Centre for Cloud Computing and Commerce (IC4) (www.ic4.ie) where security research is included in their research programme: (www.ic4.ie/research-themes/)	Q4 2017	UCC, IT@cork, EI/IDA
177	InterTrade Ireland will promote the Fusion Programme to SMEs in the region. InterTrade Ireland will provide access to the InterTrade Ireland Challenge programme whereby SMEs in the region will have the opportunity to learn how to develop a culture of innovation through the use of a sustainable and repeatable innovation process. Learning will take place by means of briefings, workshops and mentoring in the region.	Q2 2016	ITI
178	In the pharmachem and medtech sectors, develop programmes to support enterprises to engage in clinical research by researchers and industry in Ireland. This will build on the attractiveness of medical research, so as to position the region as a location for developing the next generation of products and processes.	Q4 2018	UCC, CUH, HRB Clinical Research Facility, Health Innovation Hub, EI/IDA

Horizon 2020			
179	Develop a promotion and outreach programme to promote greater engagement at regional level by enterprises and research teams in collaborative research and to participate in EU Horizon 2020 projects.	Q4 2015	HEIs, EI, TTOs, HEIs, SFI/DAFM/IDA
180	Public research organisations and higher education institutions to work with enterprises, in particular SMEs in developing proposals for Horizon 2020 funding, with the objective of increasing participation and drawdown from EU programmes by SW businesses.	Q4 2015	Tyndall, Teagasc, UCC, CIT and ITT, South West Local Authorities, EI
181	Develop a strategy to step-up the levels of research and commercialisation of added value product development for timber harvested in the region.	Q4 2015	HEI, Coillte, DAFM, South West Local Authorities
182	Achieve planning permission for the first building of the Cork Science and Innovation Park.	Q1 2017	UCC, CIT, South West Local Authorities, landowners
183	Roll out the first large-scale Industrial Internet Consortium (IIC)-approved industrial IoT innovation platform, called INFINITE, in Europe.	Q3 2015	EMC, Private Sector
184	Achieve a 20% increase in the uptake of innovation vouchers in the South West Region.	Q4 2016	EI, LEOs

11. Attracting and embedding Foreign Direct Investment

It is intended that this South West Action Plan for Jobs will provide a structure for all the stakeholders in the region to work together in a collaborative manner to maximise future FDI investment potential, in conjunction with other economic development objectives such as indigenous industry and tourism subject to LECP identification.

Regional Development and IDA

Under IDA's new strategy 2015-2019, FDI employment targets for Regions have been developed on a whole of region basis with an investment target for each Region largely based on a number of key factors important to attracting and retaining mobile foreign direct investments. In order that IDA and the Region can achieve these targets, investor requirements as outline in Chapter 2, must be further enhanced and become a differentiator. In the face of increasing international competition for investments, greater co-operation, collaboration and integration by all local and national stakeholders will have to be quickly addressed to rectify regional impediments to winning investments. IDA is committed to playing its part in the collaborative effort by winning investments and jobs from new companies, existing companies and from new areas of opportunity in FDI, to locations that can demonstrate the capability to deliver on these exacting criteria. In addition, IDA will work with the existing base of companies to help them sustain, transform and grow. The achievement of these targets will crucially depend on working in partnership with local and national stakeholders.

IDA Ireland will work with its client base across the south west region on a sectoral basis in partnership with stakeholders in order to meet skills needs to maximise employment, leverage Research Development and Innovation (RDI) opportunities and facilitate greater co-operation between MNC's and Indigenous enterprises which have the capability to meet the supply chain needs standards expected by NMNC's under the Global sourcing initiative in partnership with Enterprise Ireland.

Succeed in Ireland – Connect Ireland – Community Action Plans

The Government, through initiatives such as Succeed in Ireland which is being implemented on behalf of IDA Ireland by Connect Ireland, have increased the level of FDI into Ireland and as a result, economic activity and job creation. Over the lifetime of the Succeed in Ireland initiative, 2,500 companies have been introduced to the programme. Over the lifetime of the *Succeed in Ireland* initiative, 2,500 companies have been introduced to the programme. 48 companies involved in internationally traded services have been approved by IDA Ireland under the programme and these companies hope to create over 1,300 jobs. A further 78 companies are considering locating to Ireland and will continue to be in dialogue with IDA Ireland and ConnectIreland.

There is also potential for ConnectIreland to work through its 'connector' programme, subject to successful engagement with the County and City Managers Association (CCMA), so as to attract young and early stage entrepreneurs that may need support akin to that of a startup rather than for established companies.

In 2014, ConnectIreland began running a more regional and community focused campaign and introduced their Community Action Plan. The overall objective of the campaign is to create visibility

and awareness jointly with the 31 City and County Councils of the key role that communities can play in job creation through the use of the ConnectIreland mechanism in particular.

The purpose of the Community Action Plan is to inspire, energise and engage communities and the councils to get involved and do something for themselves using the ConnectIreland model. Due to its work at a local level, ConnectIreland receives support from the Department of Environment, Community and Local Government through their Dormant Accounts Fund. This funding is rewarded under the category focused on economic and social disadvantage aimed at improving the quality of life for people who are economically or socially disadvantaged.

Initially, communities meet with ConnectIreland to discuss their county-focused strategy and the unique selling point of the county. A liaison officer is then appointed to each county to co-ordinate the implementation of the plan. From there the community works together to spread the ConnectIreland message and reach out to contacts across the globe, encouraging foreign direct investment. Each county is encouraged to appoint a local ambassador who will champion the campaign in their area. The Community Action Plan is an ongoing campaign that has already yielded company introductions in several counties.

As part of Regional Action Plan for Jobs, ConnectIreland will roll-out regional level programmes to help promote the South West region as a venue for FDI, engage Diasporas for the means of job creation and empower the public to become involved in the success of the region in these areas. It will comprise the following elements:

- **12 Month Media Campaign.** Through the continued implementation of the 12 Month Media Campaign, individual counties within the region will be encouraged to release at least one media piece per month, promoting and reiterating the message of the Regional Action Plan for Jobs. County specific material like this offers many advantages including giving the Plan a personal voice and helping to empower local communities to get involved in the initiative;
- **Local Ambassadors.** Regions will introduce celebrity ambassadors as part of their engagement with the public and their Diasporas. Ambassadors will be selected by the region to participate in media campaigns and promote the region as a location for successful business ventures. Ambassadors should be selected as a result of their affiliation with the region and their ability to be recognised by a large population of the region and potentially, its diaspora.
- **API & Account Manager.** Throughout the lifetime of the Plan, support will be provided to each county within the region on all aspects of the programme. ConnectIreland will provide an open API and an Account Manager for every council to leverage existing connections and to develop further opportunity for the collective goals of the Plan. The Account Manager will be available to assist with all aspects of the Plan.
- **Reaching out to Existing FDI Companies.** In consultation with IDA, FDI companies that are currently located in the region will be engaged and encouraged to participate in media materials. This venture will seek to expose the value of locating to the region. By providing soft media material including pieces taking the shape of ‘Succeeding in the South-West’, the region will be able to display the first-hand benefits of locating there.
- **Location Toolkit.** A toolkit will be published to highlight the individual benefits of locating to the region. This will take the shape of ‘Why Choose the South-West’. The Toolkit will be an invaluable source for those working in the area of attracting FDI, promoting the region and working to inform those encouraging FDI into the region.
- **Regional Collaboration Quarterly Meeting.** Every quarter a monitoring meeting will be held between all counties in the region. The purpose of the meeting is to relay progress and review achievements made by the Plan. It will also ensure communication between the parties is

efficient and that relations are strong. The time will be used to encourage the sharing of ideas and further develop the strength of the regions message and mechanisms for dispersing this message. These meetings will be chaired by ConnectIreland to ensure equal participation and effectiveness. A ConnectIreland presence will also ensure that performance outcomes are being measured and the representative will encourage a constant culture of review.

- **Higher Education Institutions.** The initiative would encourage higher education institutions in the region to create and engage an alumni network. Alumni engagement strategies are extremely beneficial to both the education institution and alumni. A structured network will allow for an efficient way for information to be shared between the two in a measurable way, with a goal of reminding alumni of the advantages of returning to the region to do business.
- **Connectivation.** Connectivation asks members of third-level institutions to submit engagement models to assist in increasing the audience of the ConnectIreland message and ultimately raise further awareness of the advantages of ‘doing business’ in the region and the importance of the relationship between diaspora relations and increasing FDI. The competition will be looking for an understanding of both diaspora engagement and FDI by competitors. The winners will be presented with a cash prize by a Government minister (e.g. Minister for Diaspora).

As part of this programme roll-out in the South West, local councils will be invited to identify the unique selling points of their particular areas. Such features will include; historical sites, cultural events, local festivals, tourist engagement opportunities and business events.

Actions

Attracting and Retaining FDI			
185	IDA Ireland will target a 30% - 40% increase in investments by overseas companies in the South West Region over the period 2015-2019. This will result in a minimum of 139 investments in the region over the period.	ongoing	IDA Ireland
186	IDA Ireland will drive Transformation with IDA client companies across the South West Region through increased client interaction with the established base of companies to sustain, support and grow their operations and support increased employment in the region. This is particularly relevant to manufacturing operations.	ongoing	IDA Ireland
187	Build an Advance Technology Building in Tralee to provide a high quality property solution to attract new FDI to Kerry.	Q1 2016	IDA Ireland
188	IDA will convene a “FDI Forum” with Stakeholders and Industry representatives on an annual basis to ensure that that region is maximising its strengths and opportunities to attract additional FDI. Through its involvement in the South West APJ, IDA will work with the South West Regional stakeholders to enhance and differentiate the regions offerings for overseas companies.	Q1 2016	IDA Ireland, HEI’s, South West Local Authorities, industry, Ibec, Chambers

189	IDA will proactively market the SW region by building on the Cork brand proposition and Kerry brand development initiatives to market key business locations of scale in the region for FDI.	Cork Q4 2015 Kerry Q1 2016	IDA
190	Develop and implement an information/networking event across the South West region for IDA clients.	Q4 2015	IDA Ireland and Enterprise Ireland
191	Growing on the successful strategy of providing property solutions, the Údarás will continue a building and refurbishment programme to help support the attraction/expansion of Foreign Direct and Indigenous Investment in the South West Region.	Q1 2016	ÚnaG
Connect Ireland			
192	Develop a Regional ConnectIreland Plan that is integrated with the Local Authorities' enterprise development and job-creation activities. Formalise the name of a nominated officer from each county in the region for the roll-out of the Plan.	Q4 2015	Connect Ireland, South West Local Authorities
193	Announce and run the Connectivation competition, inviting Third Level students to share their ideas for the future development of the Succeed in Ireland initiative.	Q2 2016	Connect Ireland
194	Liaise with HEIs with a view to holding partnership events to create a network that will allow greater communication between the institution and its alumni.	Q2 2016	Connect Ireland, HEIs

12. Social and Community Enterprise

Forfás (2013) defined social enterprise as

“an enterprise that trades for a social/societal purpose, where at least part of its income is earned from its trading activity, is separate from government, and where the surplus is primarily reinvested in the social objective.”

Social enterprises tend to provide goods and services locally, creating jobs in the local community - often to those most distant from the labour market. Social enterprises can have a triple helix impact – economic, social and environmental. (The Boomerang Recycling Initiative is just one example of how social enterprises can also address the green challenge). The FORFAS report confirmed that social enterprise is a small but growing part of the enterprise base and, with the appropriate enabling and promotional effort, there appears to be scope for increasing jobs in the sector.

To promote economic and community development, under the Local Government Act 2014, each Local Authority will develop Local Economic and Community Plans (LECP) by the end of 2015. The Regional Enterprise Strategies will support the increased emphasis on economic development at Local Authority level under these Plans, and will also feed in to the Regional Spatial and Economic Strategies to be developed by the Regional Assemblies.

APJ 2015 commits to continuing to implement the Local and Community Development Programme (LCDP) on a transitional basis pending the rollout of its successor programme, the Social Inclusion and Community Activation Programme (SICAP) which will have a strong focus on community activation, social inclusion and community development, while also focusing on and prioritising those hardest to reach.

There is a strong Social Enterprise sector in the region, contributing jobs across a wide spectrum of activity. Many of these jobs are engaged in provision of social services funded from a range of programmes both national and local. As well as direct job provision, social enterprise also contributes to the fabric of communities in maintaining services to marginalised and dependent groupings. As the region moves towards a higher rate of dependency vs. the working population, the importance of social enterprise will grow accordingly and there will be a need to continue to provide for appropriate funding streams.

Enterprise Ireland ran a new Community Enterprise Centre Development Programme for the maintenance or establishment of a strong business development function in the Community Enterprise Centres funded by Enterprise Ireland in 2012. Five centres from the region applied for support and were approved a total of €250,000. A new competitive call for proposals was launched on 15 May 2015 and provides an opportunity to set ambitious targets for CECs in the region towards the target of a 25-50% increase in entrepreneurial activity in the region, in conjunction with local authorities and LEOs in the counties.

In line with “Better Outcomes, Brighter Futures: The National Policy Framework For Children & Young People, 2014-2020 attaining the Council of Europe Quality Label for Youth Centres standard, and through same create jobs through education, training and placement programmes which support the employability of all young people, particularly those further away from the market.

The championing of ‘Universality’ across all aspects of Kerry County Council operations and other public sector organisations and in doing so make Kerry an exemplar of good practise for the social inclusion of people with disabilities.

Community Enterprise Fund

A €5million Community Enterprise Initiatives fund, open to groups and organisations in every county of the country who come together with ideas for projects to create jobs, was launched in May 2015. The fund will be awarded on a competitive basis to the projects with the greatest capacity to create jobs. Examples of projects which might succeed could include hiring skilled people who could assist with mentoring businesses, investing in hubs and co-working space where businesses could work in their early days.

The overarching goal of the Fund is to stimulate and support enterprise and job creation at a local, community and regional level. The competitive call for applications is open to new and existing organisations, groups and alliances, who collaboratively seek to promote entrepreneurship, create jobs, foster innovation and enhance export opportunities for small business. A prerequisite for proposals is the need to demonstrate innovative solutions to fostering and creating employment. Priority will be given to new approaches that strengthen the entrepreneurial ecosystem.

Through the utilisation of existing infrastructure and the leveraging of nationally available enterprise supports, the specific objectives of the scheme include:

- Fostering an increased collaborative, networked and linked approach to regional and local enterprise development and job creation
- Establishment of hubs, accelerators, networks and clusters or other partnerships based on regional strengths, opportunities and uniqueness. Within this is the establishment of partnership activities where innovative startups can be established in a supportive network before graduating to other support mechanisms or self-sufficiency
- Proactively seeking out, encouraging and supporting applications from economically disadvantaged areas and areas facing potential economic shock to foster potential opportunities for job creation and supporting enterprise
- Promotion of a progression pathway for companies as they start, develop and scale.

Actions

Community and Social Enterprise			
195	Community Enterprise Centres in the region to develop a combined strategy for promotion and management of available space so as to increase startups and entrepreneurship in the regions.	Q4 2015	CECs, South West Local Authorities, EI, LEOs, ÚnaG
196	Evaluate the Boomerang Recycling initiative and explore potential for it to be rolled out nationally (1 per waste management region) and extended to other forms of reuse.	Q4 2015	South West Local Authorities, SMILE, HEIs, Partnership Companies, Leader groups
197	Extend the social enterprise forum that has been piloted in Cork City to the SW region so as to provide a networking base, training, skills, research, mentoring and other supports for social enterprise.	Q4 2015	South West Local Authorities, Partnership Companies, Cork Social Enterprise Forum, Social Enterprise Groups

198	Promote the potential for upcycling initiatives in the region, for example in the areas of Furniture, Food and clothing.	Q2 2016	LDCs, LA, DSP, HSE, UnaG, EPA, ETBs
199	Údarás na Gaeltachta will provide support and resourcing to 6 community cooperatives to implement a programme for economic, social and cultural development in the region.	Q2 2016	ÚnaG
200	Develop collaborations with civic groups, NGOs and statutory bodies through the enhancement of existing community projects such as Community-Academic Research Links (CARL) and the initiation of new projects with the community sector. Enhance access to artistic citizenship through consolidation and development of arts-in-community projects, such as FUAIM Arts and Community.	Q2 2016	UCC, NGOs, South West Local Authorities, ETBs
201	Promote the value of Social Enterprise as means of direct job creation and to contribute to a wide range of community and social services	Q2 2016	HSE, South West Local Authorities, LAGs, DECLG, ETBs

13. Enhancing Skills and Labour Market Activation

In relation to skill supply, the key priority identified by stakeholders in the consultations is to improve the supply of relevant talent in the region and the continued development of skill sets that meet industry needs. In particular, the stakeholder consultations identified the need to enhance the range of skills development options including apprenticeships and traineeships.

The South West region is well positioned to meet current and future skills needs, provided it can continue to adapt to the changing needs of enterprises and effectively implement the major reforms currently underway. Most notable among these are the final stages of embedding the new approach to further education and training in the region and the establishment of the Education and Training Boards in Cork and Kerry, and the formation of the Munster Technological University (MTU) through the merger of Cork Institute of Technology and Tralee Institute of Technology. UCC is also a major asset for the region, being both a leader in education provision but also as a major research performer in strategically important areas. Cork College of Commerce is the largest College of Further Education in the State with approaching two thousand full-time day students attending the College. In addition, there were also over two and a half thousand students who attended evening courses in the college, on a part-time basis, in the past academic year. The College offers a diverse range of courses in an innovative and flexible learning environment. Skillnets, Teagasc and the LEOs also have key roles to play in human capital formation and skills development in the region.

The stakeholder consultations identified the need to enhance the processes for planning to meet future skills needs, including direct input from industry. There is an identified need to provide better information of skills supply from the education sector to industry in the region and similarly to highlight available opportunities to potential employees.

The consultations also highlighted a need to enhance SME engagement with FET and HEI providers, to understand what the current barriers are to greater engagement and to provide a clear roadmap to enhance these interactions. There is also a need to improve how SMEs can recruit available talent and to bring leadership skills to small business in areas they would not normally be able to access by virtue of their scale.

The region is well positioned to continue to attract investment and talent from abroad, but the consultations highlighted the importance of raising the profile of the region as a location for talent to international audiences. The focus on development and attracting talent is to create a dynamic of increasing the knowledge base, seeding future skills development, and developing closer dialogue between industry and students in the region.

It was also suggested through the consultations that the process of alerting students to available roles in the region could be improved to enable students, adult learners and jobseekers attending third level and FET to be more self-reliant and engaged with industry in the region. There is a need to better match skills supply and demand in the region, to help to reduce unemployment, meet skills shortages and support effective transition to work for graduates.

Supported by the Department of Education and Skills (DES), Cork and Kerry ETBs, CIT, UCC, IT Tralee and Skillnets have come together to work with public and private sector stakeholders to establish an Employer/Education provider Skills Forum for the South West. This Forum has the potential to effectively and collaboratively address a number of these issues and to be a key resource and enabler in the region to support economic development.

In terms of primary and second level education, further engagement with teachers and guidance councillors in the region is identified as important for the region to develop, helping teachers to

communicate industry and business stories back to students to support career planning, entrepreneurship and innovation. Further initiatives that could be taken to foster a wider interest and basic knowledge of science and maths to encourage take up of related careers were also identified.

Skillnets actively supports and works with businesses in Ireland to help them address their current and future skills needs through an enterprise-led approach. Skillnets funds groups of companies with similar training needs, through training networks that deliver subsidised training to Irish businesses and their employees, as well as free training to job-seekers. Skillnets has 63 training networks nationwide. Through its ManagementWorks programme, which offers structured learning and one to one mentoring support, Skillnets works with SMEs to build their management capability.

Skillnets training networks based in the South West region:

- BiznetCork Skillnet
- IT@Cork Skillnet
- Pharmachem Skillnet
- Rural Food Skillnet
- South Kerry Skillnet
- South West Gnó Skillnet

Other national sectoral Skillnets that deliver training to companies in the South West region include;

- Farm Business Skillnet
- ISA Software Skillnet
- IMDA Skillnet
- Innovation & Lean Sigma Skillnet
- ISME Skillnet
- National Organic Skillnet
- Taste4Success Skillnet

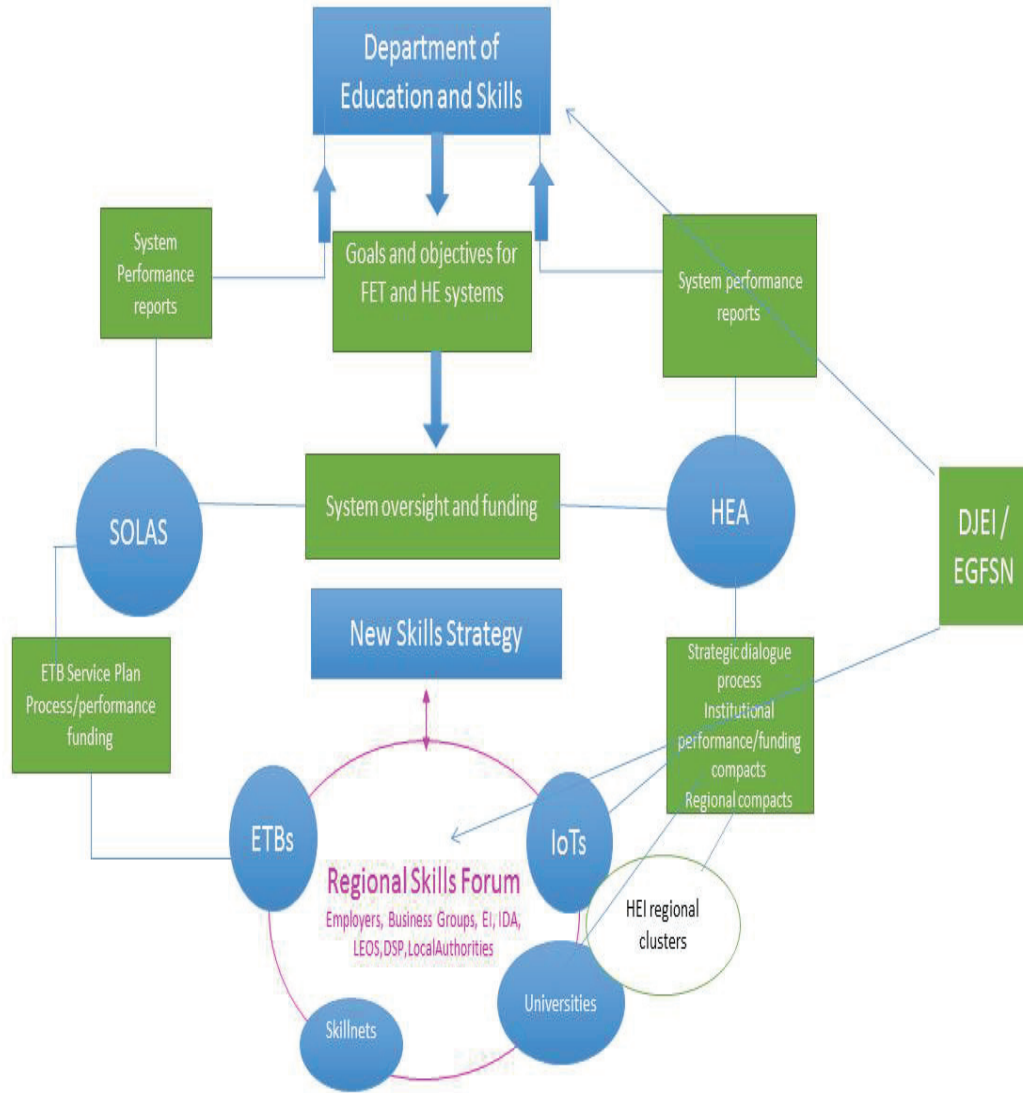
The main sectors supported by Skillnets in the South West region are pharmaceutical, medical devices, ICT technology, food & drink, agriculture, tourism, retail and manufacturing. Further information on Skillnet networks and training courses is available on www.skillnets.ie

Skills Forum

The Department of Education and Skills (DES) has initiated work on a proposal to establish regional structures for engagement between DES providers (ETBs, Institutes of Technology, Universities, Skillnets), employers and other stakeholders on skills and related issues. The objective for the Forum is to serve as a mechanism to cluster and connect skills for the region and strengthen the regions talent pool by:

- Enhancing the planning of education and training provision to meet future skills needs with greater employer input;
- Providing better information for employers on the skills supply from the education sector;
- To highlight opportunities and career pathways to potential employees;
- To enhance SME engagement with education providers;

- To help improve how SMEs can recruit available talent; and
- To understand and overcome current barriers to greater engagement.



Actions

Regional Skills Forum

202	Establish an Employer and Education Skills Forum to anticipate and ensure education and training provision is meeting future skills needs of the region through greater employer input, better information for employers on the skills supply, for potential recruits on opportunities and career pathways and providing a mechanism to address barriers identified by employers and providers to collaboration.	2016	UCC, CIT, ITT, ETB's; Skillnet; DES, Solas, Business Representative Bodies, IDA, EI, South West Local Authorities
-----	--	------	---

Science, Technology, Engineering, the Arts and Maths

Besides the overall business and taxation environment, what keeps international technology companies anchored in a region and facilitates new indigenous companies to start in a region, is the skill base and depth of the local talent pool. It is important that the South West region delivers the range of skills required by enterprise across the spectrum of science, technology, engineering, maths and the arts, which extends from primary to tertiary education, and be such as to ensure the availability of the high quality science, technology, engineering and maths graduates that are required to:

- To establish and grow their own businesses in the region, particularly exporting businesses that are offering high value products and services;
- Underpin and provide sufficient competent staff for foreign direct investment;
- Induce successful companies that already have a presence in Ireland to open offshoots in the region and/or to support local/home working in regions outside Dublin; and
- Attract high-quality domestic and international startups.

In a globally competitive environment, the South West region needs to ramp up quickly the delivery of the highly skilled science, technology, engineering and maths (STEM) graduates required to realise the return on investment required by these companies and to ensure an adequate supply of such talent in the future. The objective is to create a long-term supply chain of skills where progressively greater numbers of scientists, technologists, engineers and mathematicians are entering the regional workforce year on year.

The STEAM Education initiative will be developed for the SW region to help create the South West region as a particularly attractive region for establishing and attracting companies that require an ongoing supply of STEM graduates. The STEAM Education initiative was conceived and is based in the South West region and the STEAM Science programme is the first part of a five strand approach which covers Science, Technology, Engineering, the Arts and Maths.

The Science strand is targeted at fifth and sixth classes and runs for 25 weeks of the school year with scientists (usually PhD students, co-teaching with the regular teachers) spending one hour each week with the class dealing with a specific aspect. The teaching and course material is of a very high quality and is made available to the students to take home with them, thereby helping to raise the level of awareness about STEAM in the community. The course starts by following the timeline of the universe, starting with the Big Bang and arriving at humans and our impact on our planet, some 13.7bn years later. This course content has been developed by and is supported by a team from University College Cork.

Initially, these outreach teams comprised PhD students and graduates from UCC and Trinity College Dublin who delivered the weekly modules to primary schools Cork, Dublin and Galway. This approach created a cadre of highly qualified personnel who have gone through the entire process and understand the hurdles that new volunteers will encounter as they begin to work with primary teachers and pupils. This precursor created experienced teams of mentors to work with schools and train outreach volunteers from industry to deliver the 25 Science modules into the communities within which they operate.

The impact of the intervention is being monitored formally on an ongoing basis but, anecdotally, the raised awareness of the STEAM subjects amongst students and teachers, along with the higher performance of the students who have gone on to secondary schools and an increased number of such students going on to study STEM-related courses, is very encouraging.

All STEAM strands are designed to be delivered by volunteers from industry partners who can be supported by mentors from UCC, Cork Institute of Technology (CIT) and Institute of Technology Tralee (ITT).

The involvement of industry is based upon data about the relevant industry so we can more closely target those business partners within the region who are most likely to look favourably on the proposal. To this end, we are in the process of mapping all the primary schools in Kerry and Cork and linking these to the operational locations of the approximately 1,000 IDA and EI supported enterprises in the South West region. This data is then cross-referenced to each company's published Corporate Social Responsibility aims. In this way, we can begin to tie schools together with all of those companies which have a positive predisposition to outreach and might be approached to part fund this type of initiative.

If the proposal to establish a STEAM Education ecosystem in the South West Region is accepted and supported as part of the Action Plan for Jobs for the South West Region, STEAM Education and UCC will work with the relevant State agencies, County Councils, CIT, ITT and other relevant stakeholders to roll out the programme throughout the region, to an agreed timeline.

Initiatives at Kerry ETB, such as Future Skills research in the County in the last few years in collaboration with IT Tralee, LEO, EI, DSP, Local Development Companies, Skillsnets, as well as a recent study on the delivery of Work Experience in FET courses and involvement in the development of the DES driven South West Regional Skills Forum have helped to identify a number of different ways the ETB can deepen and further enhance employer engagement and direct links with industry. One of the next steps in the a Kerry ETB is to conduct an occupational skill profile with key businesses across a number of sectors so as to develop bespoke industry led programmes.

Actions

Responding to Skills Needs for a Growing Region			
203	Advance the ambitious plans for the establishment of the Munster Technological University and ensure all stakeholders are engaged as required throughout the process.	Q2 2017	CIT, ITT
204	UCC to provide remote (physical and online) teaching and learning to centres around the South West region in such a manner that both individuals and local community groups can avail of third level courses from high quality training facilities based in their local area and with support and accreditation by UCC. (Akin to ACE Credit Union Studies across Ireland)	Q2 2016	UCC, CIT, ITT, South West Local Authorities,
205	Develop teaching programmes to upskill in Food Science and processing and Food Business (CPD)	Q2 2016	UCC, industry, ETBs
206	Boost apprenticeship recruitment by industry in the region as there is growing demand across key sectors of the economy from manufacturing to construction sectors.	Q2 2016	Industry, Education and Training Providers
207	Establish a jobs-shop hub to provide a centralised source for alerting HE students of the availability of part-time and summer jobs in the region. Such a 'job shop' concept would bring small companies together and provide mentoring based on their needs.	Q1 2016	CIT/ITT

208	The IGNITE programme in the region is designed to support recent graduates of all third level institutions in starting a company through early stages of business development. Investigate expanding the capacity, subject to securing additional funding, from the current 10 individuals maximum through collaboration with partners to become a destination program for young entrepreneurs coming from within and outside the region.	Q1 2017	UCC, CIT, IT Tralee, South West Local Authorities, EI, LEOs
209	Expand the Student Inc, scheme in CIT and other HEI's to drive entrepreneurship and demonstrated employment generation. The scheme is operated and funded mainly by CIT and the Rubicon Centre, has delivered 19 student entrepreneurship projects since 2011, 8 of which are now offering employment to 26 people. The cost of these jobs generated is very competitive.	Q3 2016	HEIs
210	Enhance the skills pipeline by actively promoting STEM as a career throughout schools and in particular change the perception of STEM among females through these initiatives.	Q2 2016	IT@cork, Chambers
211	Support SMEs demonstrating potential to grow with placement of high performing graduates for a 12 month accredited period of placement in order to support the accelerated growth opportunity for the business.	Ongoing	HEIs, South West Local Authorities, EI, LEOs,
212	Údarás na Gaeltachta will assist in the development of educational programmes in cultural tourism to attract overseas visitors to the region.	Q4 2016	ÚnaG
213	PCI and IMDA to prepare a comprehensive plan to enhance the skills base in the region and to identify the infrastructural supports required to deliver same.	Q2 2016	PCI, IMDA
214	PCI and IMDA to deepen industry links with schools and third level institutions in the region including careers promotion, promotion of STEM and support for development of supporting promotional materials and outreach activities in STEM.	Ongoing	PCI, IMDA
215	PCI and IMDA to run a series of cross sectoral workshops in the region to bring together a number of other sectors with the Biopharma and Medical Devices sectors to explore best practice in manufacturing, quality and regulatory affairs, R&D and skills	Q3 2016	PCI, IMDA
216	PCI to develop an action plan with local universities and IOTs to support high end process development in the sector in such areas as continuous manufacturing, antibody drug conjugate development and biosimilars. This action plan would be developed in collaboration with SSPC 2 , PMTC and NIBRT	Q2 2016	PCI

Teachers – Primary and Second level		
217	Explore the value of a STEAM (Science, Technology, Engineering, Arts and Maths) programme to all primary schools in the region, so as to differentiate the south region nationally and internationally through having a very strong pipeline of very skilled students in the STEAM subjects, in collaboration with business.	Ongoing HEIs, Business Representative Bodies
218	Develop a cost neutral model for the extension of the Cork County Council funded, Mallow Development Partnership/ UL NCE-MSTL joint Schools Project to primary schools across the region	Ongoing DES, UL, UCC, HEIs, MDP
219	Develop a programme in UCC, CIT and ITT to allow all transition/fifth year students to avail of opportunities to attend a number of lectures in the subjects of their choice at any of the higher education institutes.	Q3 2018 UCC, CIT, IT Tralee, schools
220	Expansion of STEM programme at primary level to all schools and consider how best to insource ICT graduates to assist/drive the delivery of STEM programmes	Ongoing DES
221	Encourage greater participation in transition year exchanges of students from the region and Erasmus programme participation to enhance linguistic skills and encourage overseas students to return to work in cork	Ongoing Schools, ETBs, HEIs, DES
Work Placements		
222	Provide increased numbers of internship and work placement opportunities in enterprise in the region, to enhance employability of graduates and the workforce resilience of our graduates. This will involve SMEs in a structured way to increase absorptive capacity in the region to augment the capacity provided by the strong base of MNCs engaged in internship programmes.	Ongoing South West Regional Skills Forum

14. Enhancing the Business Environment

There are a range of business environment factors that improve the attractiveness of a region. This section focuses on three key areas of property solutions for enterprises, public procurement and finance for growth.

14.1 Property Solutions

The availability of attractive property solutions for scaling enterprise, entrepreneurs and new investments by foreign subsidiaries is an important part of the competitiveness of a region for investment. Investors are slowly returning to the market, most notably in Cork City, where there is up to 500,000 square feet of office space with planning or construction in the city centre. The City Council has also purchased three sites in the city centre to develop a digital hub and co-working spaces to complement the Tech Corridor being developed between the city centre and Mahon through the South Docks.

The IDA has an attractive suite of utility rich Strategic Sites and Business & Technology Parks and, as noted above, has further developments planned for the region as part of the Government’s commitment of €150m to the IDA’s strategic site initiative announced in early 2015.

However, there are a range of other sites and property solutions throughout the region, in public and private ownership that need to be mapped and compiled and made available as an information resource for enterprises and potential investors. The consultations with stakeholders indicated that there are a range of good facilities available for new startups and these should be mapped and actively promoted. As noted later in this Action Plan, it is also important that the infrastructure needs of key enterprise parks and strategic sites such as the Cork Science and Innovation Park are prioritised as part of future public capital expenditure programmes as resources become available.

Actions

Property Solutions for Business			
223	Map and promote the development of ready-to-go sites so as to capture economic opportunities. This should entail an audit of Enterprise Parks in Towns/ Small Towns across the region that could be used by scaling enterprises or new businesses considering establishing in the region. Identify the deficits / opportunities and make the audit available as a resource for enterprises.	Q4 2016	LA, ÚnaG, ETB, ITT, EI, IDA, LEO, Property and Construction Representative Bodies
224	Together with ISIF and the EIB pursue options for funding of startup and other business and enterprise facilities throughout the Region	Q4 2015	South West Local Authorities, ISIF, D/Finance, EIB

225	The targeted development of research capacity/startup, facilitation and co-location of enterprise within the proposed University (MTU) campus is vital to the economic strategy for both Kerry and the Region. Kerry Technology Park will form part of a partnered approach between Local Government and the IT Tralee – working with the state agencies and companies to develop the Technology and Research Campus is essential to providing that targeted approach.	Q4 2016	ITT, KCC
226	Consider the future development of Economic Strategic Sites across the region. The appointment of a Business Development Manager within the region would be a key enabler to achieving this outcome.	Q4 2016	South West Local Authorities
227	Develop the Shannon Estuary and particularly the development of the strategic development locations of Tarbert and the Tarbert/Ballylongford landbank) Facilitate private sector development of an LNG Plant along with a CHP plant on the Tarbert/Ballylongford landbank.	Q3 2016	KCC

14.2 Integrated Licensing Applications

The Local Government Management Authority, working with DJEI has completed a tendering process for a national Integrated Licensing Application System, to be provided by An Post. This provides a real opportunity to increase the efficiency of licensing applications across a range of public service area and the South West should aim to be an early adopter of the system, with significant benefits for businesses.

Actions

Integrated Licensing Application			
228	Licensing bodies to be among the first to adopt and promote the use of the new national Integrated Licensing Application System.	Q4 2015	LGMA, DJEI

14.3 Public Procurement

Access to public procurement within the region can be an effective means of developing business capabilities and capacity for existing and new businesses. While the over-riding concern remains value for money, it is important that public procurers engage effectively with the market to understand latest technologies and trends and best available solutions. This engagement can help with ensuring that requests for tender are also up to date on focused on securing the most economic tenders for the long term. There are a range of initiatives proposed by InterTrade Ireland in this regard, with a particular focus on the South West region.

Actions

Public Procurement			
229	Local authorities and other public bodies to promote greater SME engagement in public procurement.	Q4 2015	South West Local Authorities, EI, LEOs, HSE, ÚnaG
230	InterTrade Ireland will promote public tendering opportunities to SME's in the region including cross border public sector opportunities, consortia building for larger contracts and below threshold contracts.	Q2 2016	ITI, LEOs & other relevant local organisations
231	InterTrade Ireland will explore organisation of regional public sector 'meet the buyer' event.	Q3 2015	ITI, OGP, HSE, Local Authorities, LEO's,
232	Promote the KCC shared services National Procurement Office. Increase the awareness of Kerry as the National Procurement Centre.	Q3 2015	KCC, South West Local Authorities, EI, OGP LEO

14.4 Finance for Growth

Finance is the lifeblood of every business and is needed at every stage of the business lifecycle through from the very early stages of concept development and prototyping, to setting up a business and navigating the early years, through to growth and expansion. In addition to reinvesting profits⁹, enterprises need access to funding to invest in productivity improvements (including through automation) in RD&I and for sustaining the (sometimes quite long) lead times in accessing new export markets. The Government has a range of initiatives in the market to ensure growing and developing business have access to the range of funding options and banking services that are needed. These include MicroFinance Ireland promoted through the LEOs, the Loan Guarantee Scheme and the funding being provided through the Strategic Banking Corporation of Ireland. EI also support regional investment funds, such as Kernel Capital based in the South West region.

It is apparent that a dedicated resource should be made available to support Companies in Incubation Centres in Cork Institute of Technology and Tralee Institute of Technology with expansion of the facility available to the region, particularly to E-centres and Enterprise Centres.

The dedicated resource required would deliver outputs as follows:

- Identification of Funding Sources;
- Preparation of Submissions to Funding Bodies;
- Assistance with sourcing Private Investors through Angel Syndicates and Crowd Funding Platforms, and third parties such as Accountancy Practices and Private Finance Houses;
- Advice on Negotiation of Term Sheets and other forms agreement from both Angels and Venture Capitalists; and

⁹ Note that enterprises are not necessarily profitable throughout their business lifecycle

- Assistance in maintaining relationships with funders once agreement is made.

The output of this support would ensure that clients gain access to all appropriate funding. In addition to the increase in Angel and Crowd Funding and the maturing Venture Capital Market in Ireland, the dedicated person would become a subject matter expert in all types of funding.

This initiative has the potential to scale beyond the Incubation Centres to support clients outside and across the region. In the case of the South West region, initially this resource would be shared by Cork Institute of Technology and Tralee Institute of Technology, but could quickly move to support the E-centres and Enterprise Centres.

Actions

Finance for Growth			
233	Promote participation by SMEs in MicroFinance Ireland, Loan Guarantee and SBCI funding.	Q4 2015	LEOs, EI
234	Promote HBAN, the Halo Business Angel Network to offer local high growth potential companies the opportunity to pitch for funding from high network individuals and business angel syndicates	Q4 2015	HBAN, EI
235	Develop the Business Angel ecosystem with particular reference to Regional Angel Syndicates	Q4 2015	HBAN
236	EI will run two Finance for Growth Workshops in the region in the second half of 2015. The workshops will be aimed at EI clients (preferably that work within the finance function).	Q4 2015	EI
237	InterTrade Ireland will host 15 workshops under their “Funding for Growth” initiative in the region to promote all traditional and non-traditional sources of finance to local businesses. Local businesses will benefit from hearing about alternative sources of finance and how to access it. Businesses will also have the opportunity to meet with a corporate finance expert to discuss their individual funding needs at the regional ‘Funding for Growth’ Clinics. These workshops will also focus on equity awareness raising at a regional level including providing unique equity advisory clinics where companies can meet with an equity expert, business planning workshops and venture capital case studies.	Q4 2016	ITI
238	Promote the Seedcorn Competition to give HPSUs the opportunity to improve their investor readiness by taking them on a comprehensive mentoring journey and introducing them to investors.	Ongoing	ITI

15. Key Infrastructure Requirements to Support Enterprise

The following section sets out infrastructure needs for the region – the priority is to ensure that the strategic development zones, enterprise parks and business centres are adequately serviced with secure, reliable, cost competitive and high quality infrastructure and services, including energy, telecoms, transport, waste and water. Key priorities emerging from the stakeholder consultations are set out below.

15.1 Broadband and eCommerce

Broadband is recognised as an essential infrastructure for economic and social activity in so many areas and is absolutely essential for enterprise development and growth. It is also a key infrastructure for enabling the development of remote working and other digital enabled activities, most particularly in the context of growing eCommerce in the region. High speed broadband roll out beyond urban centres will increase potential home work force. The availability of high quality broadband is strategically important to improving the productivity of the Irish workforce, facilitating innovation and job creation, improving our status as an attractive location for foreign direct investment and enabling Irish firms to compete in international markets. High speed broadband is essential to rural businesses both existing and prospective.

Supply

While the South West region has excellent connectivity from large urban centres to the national network and onwards to global networks, there is an ongoing need to develop the connectivity of the region itself to the Internet backbone and to accelerate the deployment of 100Mbit/s broadband across the region. Despite substantial investment by the private sector some 32% of commercial and residential premises in Cork do not have access to high speed broadband. The figure for Kerry is 57%. Much investment is occurring in the development of the broadband network throughout the country and it is envisaged that all towns with a population of greater than 1,500 will be served in the very near future. Over the last 18 months the telecoms operators have made a network investment of some €18m in Kerry alone.

The national network consists of a core of 40 Gbit/s fibre cable running from Dublin to Galway and most of southern Ireland with the exception of Co. Kerry which is serviced by two offshoot 2.5 Gbit/s fibre which connect all the major towns of Tralee, Killarney, Listowel and Abbeyfeale. There is also world-leading research underway within the region on telecommunications infrastructure and services and this should be fully exploited to boost the provision within the region and to trial and test new technologies.

There are opportunities to press ahead in advance of the National Broadband Plan with initiatives that can nurture and demonstrate demand and facilitate jobs growth and to improve the attractiveness/viability for outside investment and for indigenous startups.

Demand

The business community is committed to working with market players to ensure the necessary services are available and taken-up. The Government's National Broadband Scheme to be rolled-out

from 2016 will ensure complete access to high speed broadband (i.e. 30Mbps the region by 2020. In the meantime however, there is a need to continue to work with telecom operators to provide to make the case for investment in advanced networks, to demonstrate the market demand and to develop the sophistication of use within the region.

The Local Enterprise Offices will provide support to enterprises that want to e-enable their businesses or seeking to scale up their Internet presence and activity. Across all sectors of the economy, a minimum benchmark of getting to one-third of sales via ecommerce should be set as an objective for 2017.

Actions

Broadband and eCommerce			
239	Local Authorities, through the CCMA and the NRA to work DCENR, DTTS and TIF to facilitate the rollout of high speed broadband.	Q4 2015	South West Local Authorities, CCMA, DCENR, TIF
240	Develop demonstration initiatives with operators to stimulate demand for broadband, such as the enterprise-led initiatives being proposed in Skibbereen.	Q1 2016	South West Local Authorities, commercial telecom operators.
241	Complete delivery of two international cables to the South West region and progress plans to extend these to mainland Europe.	Q4 2015	Private sector, South West Local Authorities and commercial telecom operators
242	Accelerate the take-up of ICT On-line Vouchers in the South West region, to build capabilities to exploit ecommerce and advanced broadband.	Q3 2015	DCENR, Retail Associations, LEOs
243	Complete a targeted broadband needs analysis of the region targeting specific areas for shorter term economic gain.	Q4 2015	South West Local Authorities, DECNR, DECLG,
244	Develop a plan to be the first movers in the National Broadband Plan (Department of Communications, Energy & Natural Resources) and to facilitate the rapid roll-out in priority areas in the region for investment, having regard to “double blackspot” status in certain areas.	Q4 2015	South West Local Authorities, DECNR, DECLG,
245	Údarás na Gaeltachta will upgrade the broadband infrastructure to its business parks by ensuring deployment of fibre optic infrastructures.	Q4 2016	ÚnaG

15.2 Road Access

As the economy returns to growth, the demand for transport services and supporting infrastructure is increasing. Targeted investment is required to minimise congestion and associated costs. In particular, we need to address a small number of bottlenecks to improve road access between and around the main regional cities and allow the full benefits of the significant investment in road and other infrastructures already made to be fully captured.

Increasingly cities are the drivers of national economic growth and competitiveness. While access from the main cities of Cork, Galway, Limerick and Waterford to Dublin has improved significantly with the completion of the motorway network, connectivity between the main cities remains an issue. Improving connectivity between the main regional urban centres, particularly along the Atlantic Corridor (Sligo-Galway-Limerick-Cork-Waterford) to facilitate the development of regional agglomerations of international scale and provide access to the main air and sea ports is critical for enterprise development.

The main inter-urban roads are now complete and provide excellent connectivity to gateway city of Cork and notable road links built in recent years include the South Ring Road, the South City Link Road, and the river tunnel (Jack Lynch Tunnel) linking the north and south of the city.

Cork and its metropolitan area has excellent road connectivity to the key cities of Dublin & Belfast. The delivery of the National Motorway network has provided Cork – Dublin - Belfast route with the highest standard of road infrastructure facilitating journey times (c. 2hrs 15 minutes. Cork-Dublin and 4hrs 30 minutes Cork -Belfast) that are highly competitive with those between other similarly separated European Cities.

There has been significant investment, over the past 15 years in upgrading the access between the Tralee / Killarney Hub and Cork, with the completion of the Ballincollig By-Pass, and more recently the N25 Southern Ring Road Interchanges and the Tralee By-Pass, which have significantly improved journey times. Notwithstanding this significant investment, a number of bottlenecks remain and further investment is required to ensure the region can capture the full potential for growth in tourism and agri-food and other exporting sectors, in particular the N22 Killarney to Cork route by-passing Macroom and Ballyvourney, for which planning approval is in place. The upgrading of the remaining road arteries converging on Cork City particularly the M/N20 Cork- Mallow- Limerick, the N25 Cork – Middleton – Youghal - Waterford and the N71 Cork- Bandon- West Cork would increase the population within one hour commuting distance of the Cork Metropolitan area thereby bringing more of the Region within its catchment. The tourism, agri-food and forestry sectors will rely heavily on the upgrading of the N71 from Cork to West Cork for which proposals have been prepared for upgrades between Bandon and Skibbereen and the N72 and N73 in North Cork, particularly a by-pass of Mallow, in order to improve their competitiveness and reach their potential.

Improved access within the Cork Gateway is also required through investment in strategic routes, to implement the City Centre Movement Strategy and promote sustainable transport projects (walking, cycling and public transport). This will unlock sites for employment and residential uses.

Access from the Tralee/ Killarney Hub to the Limerick gateway, and onwards to Dublin, has also been significantly improved with the completion of the Castle island By-Pass.

However, the downturn in the economy resulted in a significant scaling back in the public capital programme, and there remain a number of road infrastructure bottlenecks to be addressed as part of forthcoming Public Capital Programmes as funding becomes available. These bottlenecks are both within the region and connectivity to other regions, most particularly the completion of the Atlantic Corridor, from Limerick to Cork and Waterford, the N22 Macroom & Ballyvourney Bypass. A number of bottlenecks remain within the region and further investment is required to ensure the region can

capture the full potential for growth in tourism and agrifood and other exporting sectors. Improved access is required also in due course to strategic land banks at Carrigtwohill East (Ballyadam), Ringaskiddy, Cork Science & Innovation Park at Curraheen and Kilbarry to Great island, Marino Point and Cobh.. Facilitate development of agrifood, tourism export sector and prioritise indigenous sectors. Road improvements will also ensure optimal connectivity to the airport and seaport infrastructure in the region.

Although a number of road schemes are currently suspended, planning, studies, and continuation of road upgrades have continued throughout the County. Road infrastructural improvements in Cork reflect the high level of investment in Cork as a major gateway city by the Irish Government under the National Development Plan 2007-2013.

The National Roads Authority in conjunction with Cork City Council and Cork County Council have completed re-signing a specific section of the existing N25, between the N8 Dunkettle Interchange and N22 Poulavone to Tralee, to create the new N40 and are currently undertaking a Demand Management Study on the route in order to maximise its value as a strategic route to the overall development of the Region.

This re-signage programme is the first step in creating a single national road corridor that will ultimately become a full ring road servicing access to and from the City of Cork. The new N40 will become an “urban ring” in accordance with best international practice on roads servicing major city centres. The new numbering system will allow for new junctions to be added when future works are completed.

Future priority projects

- Dunkettle Interchange. Plans are currently underway to upgrade the Dunkettle Interchange at the N25 / M40 / M8 junction at the northern entrance of the Jack Lynch Tunnel.
- Cork City Centre Movement Strategy and strategic routes (including preliminary work on the Bus Rapid Transit project)
- Cork Docklands bridge and road infrastructure
- M20 Cork to Limerick road is essential especially for agricultural interests in North Cork
- N69 North Kerry (Tralee - Limerick)
- N28 Cork Gateway to Ringaskiddy employment area. It is proposed to improve the existing N28 from the Bloomfield Interchange on the N40 South Ring Road to Ringaskiddy Village. The improved road will have a greater capacity to cater for the high traffic volumes associated with:
 - Industries located in the Ringaskiddy area including major pharmaceutical companies,
 - Cork’s deep water port (and proposed expansion)
 - Ferry terminal
 - Headquarters of the Irish Naval Service.
 - NMCI & Beaufort Research Centre
 - Demand management proposals for the N40
- N22 linking Cork gateway with Tralee/Killarney linked hub and N22 Ballyvourney – Macroom – Ballincollig Road Improvement Scheme. This will involve the construction of 43km of new carriageway from the end of the Ballincollig Bypass to Ballyvourney, including a bypass of Macroom town, for which planning approval is in place. The Constraints Study, Feasibility

Study and Route Selection process for the upgrading of the N22 Farranfore to Killarney Road incorporating a new by-pass of Killarney Town has been completed.

- M20 Motorway linking Cork to Limerick Serving Mallow, Buttevant and Charleville will improve safety and travel times while at the same time relieving traffic congestion in the towns. This project had been advanced to the submission of a Motorway Order to An Bord Pleanála when it was put on hold
- Short term measures are required in the interim period ahead of the construction of the N20 to provide relief in the towns of Charleville and Mallow. In the case of Mallow this would provide for a connection between the N20, N72 and N73. These bypasses are seen to be critical to provide for the additional traffic resulting from the removal of agricultural quotas and consequent increases in production at plants in the two towns.
- Improvements to the N72 and N73 are vital to the development of the agriculture/food and forestry sectors
- The N25 Atlantic Corridor linking Cork and Waterford Gateways. Upgrading of the sections between Carrigtwohill and Middleton and between Middleton and Youghal is required.
- The Cork Northern Ring Road is also as preliminary design stage.
- The N71 Linking Cork Gateway with the Western Area to Bandon-Inishannon is at the feasibility/constraints study stage. Upgrading to Skibbereen is seen as a priority
- R624 Cobh Road
- Cork Science and Innovation Park Road
- Carrigaline Western Relief Road

Actions

Road Infrastructure

246	The continued development of the road infrastructure in the region remains a priority to improve the functioning of the region. Work with the DTTAS on the business case for the upgrade of Cork to Limerick route to motorway standard, as resources permit. The Macroom by-pass is also important for the connectivity of the South West region.	Q4 2015	South West Local Authorities, NRA/DTTAS
247	The realisation of the employment potential in the City Centre and Cork Docklands and Tivoli requires investment in strategic routes, the City Centre Movement Strategy and sustainable transport projects	Q4 2016	South West Local Authorities, NRA/DTTAS

15.3 Ports

Cork harbour is the second largest natural harbour in the world and the premier port in the South of Ireland. Cork is a natural, sheltered, deepwater port superbly situated close to the main shipping lines to Northern Europe. It is one of two Irish ports which handle all five shipping modes, lift-on-lift-off; roll-on-roll-off; dry bulk; liquid bulk and break bulk. In 2000, the Government committed a further capital investment of some €35 million to the Ringaskiddy Deepwater and Tivoli Container Terminals which will make Ringaskiddy the only multi-user facility in Ireland capable of handling fully laden Panamax size vessels. It is also Ireland's first Freeport and its principal offshore servicing port.

Port of Cork trade traffic increased in 2013. Total traffic through the Port of Cork in 2013 reached 9.1 million tonnes compared to 9.05 million tonnes in 2012. Like most Ports worldwide, the Port of Cork has experienced very challenging trading conditions in 2013, however some cargos have shown an increase compared to 2012 levels and this is very encouraging, according to the Port of Cork.

Container volumes through Tivoli Container Terminal were up compared to 2012 figures, and Ringaskiddy Container Terminal showed an increase in both imports and exports. This increase in Ringaskiddy is predominantly down to Fyffe's banana trade handled under contract with Maersk Line, which was established in 2012. This service, the first scheduled deep sea transatlantic service from Central America to Ireland, has opened up trading and logistic opportunities for many of Ireland's imports and exports to the Caribbean.

Oil traffic through Whitegate Oil Refinery, currently owned and operated by Phillips 66 continues to have a significant impact on the overall traffic through the Port of Cork. Imports are showing similar levels to 2012 while exports are marginally down. Non-oil traffic has seen an increase of over 5.9% in imports of animal feed, cereal and fertiliser.

The Port of Cork cruise business continues to grow year on year and 2013 was no exception. 62 cruise liners called to Cork in 2013, bringing a staggering 123,000 passengers and crew to the region. These transit visitors are a welcome economic stimulus for Cork, bringing a much needed boost to the local economy for eight months of the year. Brittany Ferries had an excellent year with their seasonal service from Cork to Roscoff carrying over 79,000 passengers in 2013. This figure is up on 2012 and there is an expectation that 2014 will be another busy year for Brittany Ferries.

The Port of Cork will continue to progress plans for new and improved port infrastructure in Ringaskiddy. This will include improving access to the port, the N28. Following a decision by the Department of Transport, Tourism and Sport, the responsibility of the management and control of Bantry Harbour was transferred to the Port of Cork Company on the 1st January 2014. Through its subsidiary Bantry Bay Port Company, the Port of Cork looks forward to the development of business through this port.

The Port of Cork will continue to seek out new business opportunities for the port and in particular, the agri-food business will be a key sector for the future.

Another area with potential is the offshore supply services and renewable energy sector. The Port of Cork is experienced in handling large project cargo and has been at the forefront in offering services in the exploration and development needs of the various multi-national companies in this sector.

Details of sister seaport agreements between Port of Cork and PortMiami and the Port of Cork and Port of Shenzhen were announced in 2013. These seaport agreements will benefit the Port of Cork by increasing the exchange of information and ideas, with the intended aim of increasing.

Fenit Harbour, which is owned by Kerry County Council, is of strategic importance for the growth of manufacturing in Kerry. Liebherr Container Cranes, Ltd. in Killarney produces ship to shore container cranes, rubber-tyred and rail-mounted stacker cranes, and accessories. which are in use in over 100

ports and nearly 50 countries worldwide. With the recent 18,500 sq. m expansion of its facility in Killarney and the construction of an assembly plant in the Harbour, the company is expected to double its production in coming years. This growth will require significant investment in increasing the capacity of Fenit Harbour, which will also benefit the region in providing facilities for off-shore exploration and tourism growth. The *Fenit Harbour – Port Expansion Feasibility Report* is currently in its initial phase.

Dingle Fishery Harbour Centre one of six National FHC’s and the closest to the Porcupine Bank, the FHC would be greatly enhanced operationally with an under taking of a Dredging project. Currently there is 5.4 meters of water alongside at all stages of the tide on the western side of the main pier, this availability of water is sufficient for the larger size of fishing vessels currently using the FHC’s, it also enough to cater for coastal bulk carriers of up to 4500 tons GRT. Having the above works completed would allow the FHC to handle

- Certain larger fishing vessels which are currently landing fish in other centres.
- Current sizes of coastal bulk carriers are 90 meters LOA, these are becoming 95-100mtrs Length Overall (LOA) by market demand and it is envisaged that this will increase to **110-120** meters in the future.
- Niche cruise vessels of up to 110-120 meters LOA would be able to berth alongside, currently these craft are anchoring off the harbour due to our draught and channel width restriction. Making Dingle FHC the only cruise vessel berth on this section of the Wild Atlantic way.
- Super yachts, currently these craft are anchoring off the harbour due to our draught and channel width restriction.
- Refrigerated Cargo vessels, currently all fish processed in Dingle is shipped by road, stored and forwarded onto markets at an additional €50 per ton, in comparison to Dingles competitors. Shipping this commodity would set the processing capacity in Dingle up for expansion.

The increase in operational capability of Dingle FHC in being able to serve the above types of vessel alongside would have an economical knock on effect year round for the Peninsula and its population, these works will not detract from the other ports in the region, but enable Dingle to capitalise on a market that it is already currently serving.

Actions

Sea ports			
248	Progress plans for new and improved port infrastructure in Ringaskiddy.	Q1 2016	Port of Cork
249	Develop new business through Bantry Bay Port Company.	Q4 2016	Port of Cork
250	Develop a strategy to target new areas of business including in the agri-food and offshore energy sectors.	Q2 2016	Port of Cork
251	As part of the future strategy for the Port, fully exploit potential of sister seaport agreements between Port of Cork and Port Miami and the Port of Cork and Port of Shenzhen.	Q4 2015	Port of Cork

252	Explore the potential to expand the capacity of Dingle Fishery Harbour Centre	Q4 2015	Kerry CC
253	<p>Progress plans to expand Fenit Harbour and develop new business through the port. To drive the economic growth of the Region- the infrastructural development of Fenit Harbour– including a second Pier would enable existing companies to increase their production capacity significantly.</p> <p>As a first step, undertake a feasibility study to determine the suitability and added value of the required investment to other economic opportunities including Freight, Leisure (marina) and possible opportunity for cruise liners and ancillary port activities.</p>	Q4 2015	KCC, IDA, Fáilte Ireland, DAFM
254	Examine the needs for development of Castletownbere Harbour	Q2 2016	Cork County Council

15.4 Sustainable Travel

A key element to enhance Cork’s competitiveness has been to develop a high quality public transport offer. The City and its metropolitan area offer significant opportunities for sustainable travel offering low-cost options for travel to work and delivering significant environmental and lifestyle benefits. Careful land use planning over many decades has developed a strong housing supply in reasonably close proximity to many major employment area providing a basis to strengthen the Cork region’s tradition of walking for many journeys. The City and its suburbs are well equipped with low cost walking infrastructure and the CSO data record a significant proportion of the population choosing this mode for critical journeys. There has been significant recent and continuing investment in the cycle network with evidence of strong growth in this modal choice.

The backbone to the public transport system has been provided by the major state investment in the Cork Suburban Rail Network, linking Cork with the major metropolitan employment and residential growth centres of Little Island, Carrigtwohill, Cobh and Middleton. This network links with the city bus network at Kent Station where major redevelopment is planned for 2016. The City and County Councils are jointly promoting an integrated guided bus system (CATS) to link key city locations, Kent Station and Ballincollig.

Cork is linked to Dublin by high quality rail and bus services facilitating early morning and late evening journeys. There is significant potential to improve rail journey times and Iarnród Éireann have recently reduced the timing on key business services.

As the labour market recovers the need to develop more widespread cost-effective options for travel to work and other journeys will become paramount. It may be timely to undertake a review of public transport services and provision in the region to assess any changes that could help to improve the cost competitiveness of the region, which would improve labour market functioning and ensure better availability of staff, more balanced development, improve quality of life, less use of cars and reduce the need for car parking.

The region is also to the forefront of initiatives in car-pooling and this is an area for focused development over the next twelve months in Cork in particular, with the objective of reducing congestion and traffic flow to key employment locations.

Actions

Public Transport & Car Pooling			
255	Subject to funding, advance the proposed Cork Area Rapid Transport System with the NTA as a key future part of the public transport system for the Metropolitan Cork Region	Q4 2016	Cork LA’s and NTA
256	Subject to funding, complete upgrade of Kent Station as a commuter hub and interlink with Cork BRT	Q4 2016	Cork LA’s and NTA

15.5 Air Services

The South West region has excellent airport infrastructure within the region and connectivity to other major hubs in the country including Dublin and Shannon.

In addition to the essential role of the air services to tourism market development and to making the region attractive to multilingual staff, there is an ongoing enterprise demand for services from region as they grow exports in international markets. For example, a number of manufacturing operations in the region also have operations in UK and mainland Europe and need regular access to London/mainland Europe. It may be timely to review the needs of the region overall into the future.

The relevant airport authorities need to continue to innovate to develop air services in a cost effective and efficient manner so as to achieve the potential in the region for tourism growth and to better serve enterprise needs. Improving the times of first departures to major hubs for onward connections and concentrating on growing the market on selected priority routes were suggested as possible options to consider by enterprise stakeholders.

Actions

Air Services

257	The development of services from Cork, Kerry and Shannon airports is important for the region. Airport bodies need to continue to attract new services and improve timeliness of services and make full use of marketing and funding schemes.	Q2 2016	Cork Airport, Kerry Airport, Shannon Airport
258	Complete a review of business and tourism air routes for SW region and their potential for development, in particular to connect to central Europe to meet business needs.	Q1 2016	Cork Airport, Cork Airport Development Council, Ibec, Chambers
259	Develop options for use of the old airport terminal in Cork and how best to improve the competitiveness of the airport generally.	Q2 2016	Cork Airport, DAA, Cork Airport Development Council

15.6 Water Capacity

Ireland needs to take a strategic medium to long term approach to investment planning that delivers quality water services while also ensuring that Ireland is cost competitive. In the short term, it is vital that the current water services constraints in the Dublin area are addressed urgently and sufficient capacity is delivered to support regional development objectives - in particular in enterprise agency strategic sites and business parks and strategic development zones. Ensuring that Irish Water has an adequate revenue stream is critical to deliver the required investment to meet enterprise needs. The new non-domestic tariff framework is to be developed during 2015 – the key issues for enterprise include:

- providing certainty and cost competitive prices for business users;
- applying rigorous regulatory scrutiny to drive efficiencies in water services investment and provision; and
- ensuring the service standards required from Irish Water are tailored to fit to the water sector according to its stage of network development and are subject to periodic reviews by the regulator

Actions

Water			
260	Prioritise water supply and waste water treatment investment consistent with incoming business demands and tourism sector requirements, including as outlined in the Cork development plans and the Kerry County Development Plan 2015-2021.	Q4 2016	Irish Water, South West Local Authorities DECLG
261	Ensure that provision is made for water supply and waste water treatment to meet the requirements of development proposed under South West Local Authorities County and City Development Plans and the commercial and industrial demands arising from proposed job creation activities in the region.	Q4 2015	Irish Water, DECLG, South West Local Authorities

15.7 Monitoring Data and Information Management.

Planning for development requires examination of appropriate data properly aligned to the area under consideration. The presence of the CSO in the region provides an opportunity to develop appropriate metrics and approaches for the monitoring and management of the SW Action Plan and for other regions. Data collection is practiced by multiple agencies and there is an opportunity to enhance the sharing and comparison of this data as part of this Plan.

In 2014 the Regional Authorities of Ireland published a Regional Indicators Report, to serve as a monitoring framework for implementation of the regional planning guidelines. This report considered indicators based on three strategic themes of:

- Economic Prosperity;
- People and Places;
- Environment and Infrastructure.

Theme: Economic Prosperity	Theme: People and Places
Employment Rate	Population & Population Change
Small and Medium Enterprises	Urban/Rural Share
Companies	Dependency Rate
Employment	Housing Stock
Sectoral GVA Contribution	Housing Vacancy
GVA Per Person	Work-Related Commuting
Tertiary Education	
Broadband Coverage	
Internet Access	
Personal Computer	

The data sets used as part of the above baseline exercise will be considered by the implementation group in determining the appropriate metrics to monitor progress and impacts of this Plan and to determine where corrective action is needed.

16. Effective Execution and Monitoring Progress

This Plan has been developed under the auspices of a Project Delivery Group comprising public bodies in the South West region, working closely with private sector and representative bodies in the region.

It is proposed that the monitoring and implementation of this Action Plan be overseen by a combined public and private sector forum with membership drawn from within the region. The objective is to ensure that the processes put in place complement any arrangements that are introduced for the monitoring of the Regional Spatial and Economic Strategies to be developed by the new Southern Regional Assembly, and the Local Economic and Community Plans to be developed by the Local Authorities.

At county level, County Expert Economic Advisory Groups are being put in place, including Local Government, State Agencies, Third Level Institutions, Business Providers and Interests to assist and review County achievements under the LECP and Regional Jobs Plan to progress economic development objectives. As part of this process, specific County Economic Team / Expert are to be appointed to specifically target the initiatives identified at the Regional and County level.

The Action Plan covers a three-year timeframe, 2015-2017, to allow for the process to take hold and develop, and to capture a more medium-term ambition for the regions. The Plan will be flexible and dynamic to allow additional actions and ideas to be added as they emerge over the period of the Plan.

Progress on the actions will be monitored on a 6 monthly basis by a Monitoring Committee, and Progress Reports on the implementation of the Plan will be published twice each year. The Progress Reports will also identify areas for further action in a rolling framework.

All of the key regional stakeholders who have actions for delivery in the Action Plan will be involved on the Monitoring Committee, and will be asked to provide updates on the delivery of actions.

Strong business representation is also required to drive the enterprise and jobs focus of the Plan. To this end, the Minister for Jobs, Enterprise and Innovation will invite locally-based enterprise champions to participate on the Monitoring Committee and to work with the public bodies on the implementation of the Plan.

The Minister for Jobs, Enterprise and Innovation will also appoint the Chair of the Monitoring Committee. The Chair will have recognised strengths in promoting a strong enterprise agenda across the region. The initial period of appointment will be for 18 months.

Notwithstanding the objective of devolving ownership of the actions to the regions, the Department of Jobs, Enterprise and innovation will continue to oversee the Plan at political level and facilitate updates to the Plan through membership of the Monitoring Committees.

Processes put in place to monitor the regional Action Plan will complement other monitoring arrangements in the Local Government sphere.

Appendices

Appendix A – Employment in IDA Ireland and EI Companies

Table 9: IDA Ireland South West Region Activities

	2008	2009	2010	2011	2012	2013	2014
South West							
No of Companies	153	152	152	147	153	159	158
Total Jobs	25,981	24,078	25,496	26,478	27,868	29,037	30,419
Gross Gain	2,150	1,640	2,727	2,358	2,515	2,240	2,559
Net Change	163	-1,903	1,418	982	1,390	1,169	1,382
Cork							
No of Companies	138	138	137	135	140	147	146
Total Jobs	24,001	22,490	23,983	24,981	26,263	27,399	28,545
Gross Gain	2,075	1,587	2,676	2,187	2,395	2,139	2,312
Net Change	198	-1,511	1,493	998	1,282	1,136	1,146
Kerry							
No of Companies	15	14	15	12	13	12	12
Total Jobs	1,980	1,588	1,513	1,497	1,605	1,638	1,874
Gross Gain	75	53	51	171	120	101	247
Net Change	-35	-392	-75	-16	108	33	236

Source: IDA

Table 10: IDA Ireland South West Region Activities

Region	Net Change in Employment				Total Jobs			Number of Companies
	2008 - 2010	2011 - 2014	% Change	2014	2014	% Distribution Across County	As a % of Total at Work	2014
Border	-810	1,686	20.90%	497	9,734	5.6%	5.2%	77
Midland	-941	268	7.10%	113	4,032	2.3%	3.5%	35
West	-1,780	4,040	27.60%	509	18,652	10.7%	10.3%	89
Dublin	-3,977	17,058	31.60%	3,719	70,989	40.7%	12.1%	596
Mid-West	-5,791	1,228	9.20%	611	14,575	8.4%	9.5%	116
South-East	-661	-864	-6.70%	186	12,081	6.9%	5.9%	65
South-West	-322	4,923	19.30%	1,382	30,419	17.4%	11.0%	158
Mid-East	-1,966	-479	-3.30%	114	14,006	8.0%	5.9%	59
Total	-16,248	27,860	19.00%	7,131	174,488	100.0%	9.0%	1,195

Source: DJEI SPD Employment Survey

Table 11: Enterprise Ireland Employment by Sector, 2011-2014

	2011	2012	2013	2014
Manufacturing	13,232	13,567	13,531	13,675
International Services	4,210	4,721	5,230	6,418
Financial Services	1,246	1,284	1,465	1,675
Other	1,890	1,926	1,932	1,850
All Sectors	20,578	21,498	22,158	23,618

Source: DJEI SPD Employment Survey

Table 12: Enterprise Ireland Employment Trends 2011-2014

Cork	2011	2012	2013	2014
Number Of Plants	618	622	614	598
Full Time Jobs	17,116	18,031	18,716	20,266
Full-time Gains	2,155	1,733	1,716	2,277
Full-time Losses	-650	-818	-1,031	-727
Full-time Change	1,505	915	685	1,550
Other Jobs	1,916	1,920	2,162	2,343
Kerry				
Number Of Plants	117	122	124	119
Full Time Jobs	3,592	3,675	3,706	3,627
Full-time Gains	229	228	224	321
Full-time Losses	-91	-145	-193	-400
Full-time Change	138	83	31	-79
Other Jobs	492	503	659	687

Source: DJEI SPD Employment Survey

Table 13: Business Demography

		2007	2012
Business economy excluding activities of holding companies (B to N,-642)	Active Enterprises (Number)	32,374	27,386
	Employees (Number)	172,020	134,360
Manufacturing (C)	Active Enterprises (Number)	2,063	1,883
	Employees (Number)	37,959	29,293
Construction (F)	Active Enterprises (Number)	9,633	5,448
	Employees (Number)	28,653	8,365
Wholesale and retail trade, repair of motor vehicles and motorcycles (G)	Active Enterprises (Number)	6,630	6,279
	Employees (Number)	42,685	37,390
Transportation and storage (H)	Active Enterprises (Number)	1,749	1,461
	Employees (Number)	5,578	4,872
Accommodation and food service activities (I)	Active Enterprises (Number)	2,917	2,870
	Employees (Number)	21,377	20,745
Information and communication (J)	Active Enterprises (Number)	1,018	1,054
	Employees (Number)	6,208	5,933
Financial and insurance activities excluding activities of holding companies (K-642)	Active Enterprises (Number)	436	419
	Employees (Number)	2,918	3,477
Professional, scientific and technical activities (M)	Active Enterprises (Number)	4,565	4,650
	Employees (Number)	12,329	10,902
Administrative and support service activities (N)	Active Enterprises (Number)	1,693	1,487
	Employees (Number)	10,180	9,945
Education (P)	Active Enterprises (Number)	733	1,117
	Employees (Number)	11,177	12,708
ICT total (261 to 264,268,465,582,61,62,631,951)	Active Enterprises (Number)	946	1,006
	Employees (Number)	11,275	11,613

Source: CSO Database, Business Demography NACE Rev 2 by Activity, County, Year and Statistic

Appendix B: Range of supports and services available to Startups

Range of supports and services available to startups

Local Enterprise Offices

EI provides a support network to drive entrepreneurship, working with Local Enterprise Offices at regional level, to encourage aspiring entrepreneurs to come forward for assistance and increasing the rate of new business creation. Through strong support mechanisms now being offered at local level by the LEO network and coordinated centrally by Enterprise Ireland for the domestically trading small business SME sector, there is a comprehensive framework now in place to provide viable, sustainable small businesses with every opportunity to access the funding they need be it bank financing, equity provision or venture capital support. The Department of Jobs, Enterprise and Innovation and Enterprise Ireland will also work to explore how the Community Enterprise Centre network can best be enhanced to support regional job creation.

Mentoring

The 2014 National Entrepreneurship Policy Statement outlined the importance of Entrepreneurial Networks and referred in particular the role such networks can play in the area of mentoring. These included:

- Improve the impact of mentoring as a tool to support entrepreneurship;
- Increase the levels of peer networks for mentoring, angel finance and problem solving that sustain entrepreneurship; and
- Build world class entrepreneurial hubs and achieve greater regional spread of such hubs, facilitating entrepreneurial leadership.

New Frontiers Entrepreneur Development

For startup companies and entrepreneurs, the New Frontiers Entrepreneur Development Programme is a rapid incubation programme designed to provide hands-on support and management development for entrepreneurs who wish to start their own business. New Frontiers is a national programme funded and coordinated by Enterprise Ireland and delivered locally by 13 Irish Institutes of Technology. This national programme is co-ordinated by Enterprise Ireland which is providing €4.25 million in funding to enable the Institutes of Technology to deliver the programme at a local level. The core element of New Frontiers is a six-month intensive programme which focus' on developing the person's entrepreneurial abilities, equipping them with the skills they need to run, and crucially to develop, sustainable businesses.

The New Frontiers programme will target high-potential entrepreneurs with the commitment and capability required to develop and deliver sustainable businesses. It aims to deliver 100 new sustainable businesses, and it is expected that the programme will produce a pipeline of companies eligible for Enterprise Ireland's high-potential startup (HPSU) supports.

Participants will receive financial support of €15,000 from Enterprise Ireland as they focus on developing an investor ready business plan over a six-month period, during phase 2 of the programme. They will also be given office space in the Institute of Technology's incubation centre, mentoring and access to networking opportunities with potential investors.

There are currently ten participants on the New Frontiers programme in Tralee who are due to complete phase 3 of the programme shortly. The 2014 programme has been launched and is due to commence in April. The most recent New Frontiers Programme commenced at the Cork Institute of Technology (Rubicon Centre) in June 2014 with 12 participants and participants will graduate in

January 2015. Phase I of the new programme will commence in February 2015 with Phase II commencing in June 2015.

High Potential Startups

Enterprise Ireland activity in Co. Kerry is focussed on the creation of new jobs through supporting entrepreneurs to set up new High Potential Startup Companies. 103 *new* High Potential Start Up companies received investments from Enterprise Ireland during 2013, the highest number of new HPSUs supported during a single year. 41 female-led HPSU projects won investments during 2013, a major rise from 16 in 2012, as a number of women-specific initiatives by EI showed results and 2013 also saw a rise in the number of overseas entrepreneurs setting up their businesses in Ireland, and overseas projects represent 15% of the HPSU class of 2013

Competitive Feasibility Fund for Female Entrepreneurs

A new €250,000 Competitive Feasibility Fund for Female Entrepreneurs aimed at continuing to significantly boost the number of high potential female-led business startups was launched in August 2013. This initiative is part of a drive by Enterprise Ireland to boost the number of innovative, export-oriented businesses being set up and led by female entrepreneurs.

Competitive Start Fund

Companies in Kerry have been very successful in securing funding of €50,000 from Enterprise Ireland's Competitive Start Fund. The following Companies have received funding to date: Dingadeal, Artemis Business, Swiftqueue, United We Save Ltd., Niche Protein Ltd., Ecolux Ltd., Myclubshop.ie, Voucherlink and most recently D2E Designs.

'The Startup Gathering'

'The Startup Gathering' is a new initiative which will be led by the not-for-profit organisation Startup Ireland as a key building block towards making Ireland a global startup hub by 2020. The Startup Gathering is an ambitious project which at its heart is 'of the startup sector, by the startup sector and for the startup sector in Ireland'. It builds on the success of initiatives such as 'The Gathering' and 'The Wild Atlantic Way' in a sustainable, regionally balanced way.

While the Startup Gathering will seek to complement the building of world class entrepreneurial hubs in Ireland's cities, it will also seek to achieve a greater regional spread of such hubs by inviting the regions to submit projects to be included in the week of The Startup Gathering. The South West Region is to be represented by Cork City on 7th October 2015.

The Startup Gathering will bring numerous startups and investors from around the world to Ireland thereby helping Irish startups form international contacts and partnerships thereby maximising their potential to sell internationally and create jobs in Ireland.

Entrepreneur Partnering Programme

The new Entrepreneur Partnering Programme scheme which is being designed for a region to match entrepreneurs with host enterprises, where they can hot-house their ideas and businesses for a period of up to one year, benefiting from the expertise and guidance of the host business. DJEI, through its agencies EI and IDA Ireland will seek to match experienced business leaders and their organisations in a region to support founders and early stage startups. Host businesses will be invited to participate in the programme by the IDA Ireland and EI and will be pre-screened to ensure they fit the needs of founders and startup businesses.

In addition to the above, higher education institutes in the region will also play a continuing role in supporting entrepreneurship. For example, the Centre for Entrepreneurship and Enterprise Development (CEED) plays a key role in fostering and developing the entrepreneurial mindset as part of the innovative ecosystem of the Institute of Technology Tralee. CEED's research agenda has a particular focus on research into entrepreneurial learning, incubation and new venture creation and

sustainability. It brings together academics, spinout enterprises, student entrepreneurs, startup businesses and researchers for the study and practice of innovation, entrepreneurship and enterprise. CEED aims to be recognised as a global premier centre for the development of entrepreneurship and enterprise development in the education and business communities.

Incubation Centre at UCC

Enterprise Ireland has supported University College Cork's three sets of Incubation Units. These units are in the areas of Lifesciences/Biotech and ICT, and are comprised as follows:

- Western Gateway Building (IT) has 10 units of office space (including 8 hot-desk positions) approx. 480sq.m. will be dedicated to the Incubation Centre.
- Bio-Innovation Unit Food Science Building (Life Sciences) has 4 Units with office and wet lab capability approx. 400sq.m. including shared preparation area.
- Tyndall National Institute Prospect Innovation Centre (ICT) at Lee Mills House, Prospect Row, UCC Lee Maltings Complex, Cork. 7 Units of office space approx. 200 sq. m. (including 6 hot-desk positions).

The core function of the Bio-Innovation unit, Tyndall National Institute Prospect Innovation Centre and the IT Incubation Centre will be to nurture and aid the conception, growth and development of startup companies in the Bio/Life Sciences, ICT, and IT technology space, from embryonic state through to commercial viability.

Rubicon: The Rubicon Centre is a fully serviced Innovation Centre, supporting circa 57 companies. (Figures include New Frontiers participants and PINC Programme participants which are housed in the Rubicon). Supports provided at the Centre include own door office spaces, seminar and meeting rooms, which are all provided on a "ready to go basis" with access to voice and data. In addition, companies can avail of training, networking and mentoring supports delivered at the Centre and on site personnel deliver day to day client support.

The **IT Tralee Tom Crean Business Centre** offers a supportive environment and incubation facilities to assist innovators and entrepreneurs in taking their ideas from proof of principle to full commercial success. The Tom Crean Centre promotes innovation and enterprise through: Support for entrepreneurs, campus companies and other knowledge-based ventures; Flexible licensing allowing businesses to flourish in an entrepreneurial environment; Promotion of contract research and industrial-academic co-operation; Business training, consultancy and mentoring support.

The Entrepreneur Ship

Driven by the IMERC Partners, CIT, the Irish Naval Service and UCC, The Entrepreneur Ship in Ringaskiddy is Ireland's only dedicated innovation hub for startups and touch down companies in the maritime and energy space. It comprises of office space with 25 desk spaces hosting a mix of entrepreneurs and internationally established companies embedded in a network of support agencies, the Irish Naval Service, investors, world class test bed facilities and research excellence.

Appendix C: Project Delivery Group Membership

The membership of the Project Delivery Group for the South West Action Plan for Jobs included representatives of the following public bodies:

Bord Iascaigh Mhara (BIM)
Cork City Council
Cork County Council
Cork ETB (Enterprise Training Board)
Cork Institute of Technology
Department of Jobs, Enterprise and Innovation
Department of Education and Skills
Department of Social Protection (Intreo)
Enterprise Ireland
Fáilte Ireland
Kerry ETB (Enterprise Training Board)
IDA Ireland
Institute of Technology Tralee
InterTrade Ireland
Kerry County Council
Local Enterprise Office – Cork City
Local Enterprise Office - Cork North and West
Local Enterprise Office - Kerry
Local Enterprise Office – South Cork
Southern Regional Assembly
Teagasc
Údarás na Gaeltachta
University College Cork

The meetings of the Project Delivery Group and Regional Fora meetings in Cork and Kerry were convened by the IDA South West Region Office, in consultation with EI South West.

The research support to and preparation of the South West APJ-R was led by the *Strategic Policy Division*, Department of Jobs, Enterprise and Innovation.

Glossary of Terms

ABCRF	Analytical and Biological Chemistry Research Facility
ACE	Adult Continuing Education
APC	Alimentary Pharmabiotic Centre
APJ	Action Plan for Jobs
APJR	Action Plan for Job Regional
AUA	Atlantic University Alliance
BCRI	Boole Centre for Research in Informatics
BIC	Business and Innovation Centre
BIM	Bord Iascaigh Mhara
BIS	Business Information Services
BPO	Business Process Outsourcing
CAMMS	Centre for Advanced Manufacturing and Management Systems
CAPPA	Centre for Advanced Photonics and Process Analysis
CASP	Cork Area Strategic Partnership
CATS	Cork Area Transit System
CCC	Cork County Council
CCiC	Cork City Council
CCMA	County and City Managers Association
CCRC	Cork Cancer Research Centre
CEB	County Enterprise Board
CEC	Community Enterprise Centre
CEED	Centre for Entrepreneurship and Enterprise Development
CEOL	Centre for Efficiency Oriented Languages
CesR	Cooperatives of Employment and Services in Rural areas
CETB	Cork Education and Training Board
CFP	Common Fisheries Policy
CIR	Centre for Investment Research
CIT	Cork Institute of Technology
CMRC	Coastal and Marine Research Centre
CPD	Continuous Professional Development
CRFs	Clinical Research Facilities
CRVB	Centre for Research in Vascular Biology
CSIP	Cork Science and Innovation Park

CSO	Central Statistics Office
CTC	Clean Technology Centre
DAFM	Department of Agriculture, Food and the Marine
DAHG	Department of Arts, Heritage and the Gaeltacht
DCCoI	Design and Craft Council of Ireland
DCENR	Department of Communications, Energy and Natural Resources
DECLG	Department of Environment, Community and Local Government
DES	Department of Education and Skills
D/Finance	Department of Finance
D/Health	Department of Health
DJEI	Department of Jobs, Enterprise and Innovation
DPER	Department of Public Expenditure and Reform
DSP	Department of Social Protection
DTTAS	Department of Transport, Tourism and Sport
EER	European Entrepreneurial Region
EGFSN	Expert Group on Future Skills Needs
EI	Enterprise Ireland
EIB	European Investment Bank
EPA	Environmental Protection Agency
ERI	Environmental Research Institute
ETB	Education and Training Board
EU	European Union
FDI	Foreign Direct Investment
FE	Further Education
FET	Further Education and Training
FH2020	Food Harvest 2020
FHI	Food For Health Ireland
FSIC	Financial Services Innovation Centre
GBS	Global Business Services
GRCTC	Governance, Risk & Compliance Technology Centre
GVA	Gross Value Added
H2020	Horizon 2020
HBAN	Halo Business Angel Network
HE	High Education
HEA	Higher Education Authority

HEI	Higher Education Institutions
HERD	Higher Education Research and Development
HIH	Health Innovation Hub
HOOW	Harnessing Our Ocean Wealth
HRB	Health Research Board
HPSU	High Potential Startups
HSE	Health Service Executive
IAHT	Irish Academy of Hospitality and Tourism
Ibec	Irish Business and Employers' Confederation
ICMR	Irish Centre for Manufacturing Research
ICT	Information and Communications Technology
ID2015	Irish Design 2015
IDA Ireland	Industrial Development Agency Ireland
IERC	International Energy Research Centre
IFS	International Financial Services
IHF	Irish Hotels Federation
IMERC	Irish Maritime and Energy Research Cluster
IMDA	Irish Medical Devices Association
INFANT	Irish Centre for Foetal and Neonatal Translational Research
IoT	Internet of Things
IP	Intellectual Property
IPIC	Irish Photonic Integration Centre
IRC	Irish Research Council
ISIF	Irish Strategic Investment Fund
ITI	InterTradeIreland
ITLG	Irish Technology Leadership Group
ITT	Institute of Technology Tralee
KCC	Kerry County Council
KPI	Key Performance Indicators
KTI	Knowledge Transfer Ireland
LAs	South West Local Authorities comprising Cork City Council, Cork County Council and Kerry County Council
LECP	Local Economic and Community Plan
LCDP	Local Community Development Programme
LEADER	Liaisons entre actions de developpement de l'économie rurale
LEOs	Local Enterprise Offices

LGMA	Local Government Management Agency
LNG	Liquefied Natural Gas
MaREI	Marine Renewable Energy Ireland
MCCI	Microelectronic Circuits Centre Ireland
MDP	Mallow Development Partnership
MFI	Microfinance Fund Ireland
MNCs	Multinational Corporations
MOU	Memorandum of Understanding
MTU	Munster Technological University
NACEC	National Association of Community Enterprise Centres
NGO	Non-Governmental Organisation
NMCI	National Maritime College of Ireland
NSS	National Skills Strategy
OGP	Office of Government Procurement
OPW	Office of Public Works
PED	Potential Exporters Division
PCI	Pharmaceutical Ireland
PLC	Post Leaving Cert
QNHS	Quarter National Household Survey
R&D	Research and development
RSES	Regional Spatial and Economic Strategies
SEAI	Sustainable Energy Authority of Ireland
SFI	Science Foundation Ireland
SICAP	Social Inclusion and Community Activation Programme
SIFP	Strategic Infrastructure Framework Plan
SME	Small and Medium Enterprise
SOLAS	An tSeirbhís Oideachais Leanúnaigh agus Scileanna
SRA	Southern Regional Assembly
SSPC	Synthesis & Solid State Pharmaceutical Centre
SSTI	Strategy for Science Technology and Innovation
STEM	Science, Technology, Engineering, Mathematics
STEAM	Science, Technology, Engineering, Arts, Mathematics
SW	South West
TIF	Telecommunications and Internet Federation
TNI	Tyndall National Institute



An Roinn Post, Fiontar agus Nuálaíochta
Department of Jobs, Enterprise and Innovation

The Action Plan for Jobs is an initiative of the
Department of Jobs, Enterprise and Innovation