



Input from the Department of Enterprise, Trade and Employment into the Southern Regional Assembly Section 25A RSES Monitoring Report

February 2022

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1. The key mechanisms which the Department has put in place to ensure that investment decisions are aligned with the NPF and Southern Region RSES.

Future employment growth and sustainability requires a major focus on boosting regional growth potential. This necessitates the generation of growth that is sustainable, driven by exports and underpinned by innovation and competitiveness in all regions.

The Department of Enterprise, Trade and Employment's (DETE's) capital spending across its activities is set out at a high-level as part of Project Ireland 2040. In particular, the National Strategic Outcome of 'A Strong Economy Supported by Enterprise, Innovation and Skills' drives the majority of the Department's activities. The alignment of capital investment (in the National Development Plan (NDP)) with population and economic projections, development patterns and spatial planning (in the National Planning Framework (NPF)) as a key feature of Project Ireland 2040, is therefore further reflected in DETE's capital programmes and embedded in the enterprise development agencies that deliver them.

DETE's capital programmes include a combination of different investments, enterprise supports and competitive funding such as the Disruptive Technology and Innovation Fund, all of which are designed to deliver on the enterprise policy objectives of the NPF, the Department's strategy and enterprise policy priorities. In practice the full range of capital programmes therefore include both 'demand-led' and 'supply driven' outputs and outcomes, with particular programmes responding to enterprise needs regardless of their geographic location, and others designed to deliver outcomes aligned with spatial or regional policy objectives. Examples of the latter include Enterprise Ireland's Regional Enterprise Development Fund and IDA Ireland's property programme.

The NPF sets the ambition of ensuring that jobs growth in the Eastern and Midland Regional Assembly area is at least matched by that of the Northern and Western and Southern Regional Assembly areas combined. This ambition for Ireland's regions will be achieved by investing, through the NDP, with a primary focus on economic recovery from the COVID-19 pandemic, and laying the foundations for sustainable, broadly based, regionally balanced growth. Investments, while making places attractive for enterprise, will also drive resilience and innovation in future-focused businesses. Innovation will be central, both in terms of driving business transformation and the continuous digitisation of the economy.

A comprehensive and integrated enterprise programme of measures is included under the NDP to strengthen growth and employment potential with a particular focus on balanced regional development by building competitive and innovative enterprises, including through the following initiatives:

- Green Transition Fund – driving decarbonisation and enterprise resilience in the transition to a low carbon economy
- Digital Transition Fund - building a future-focussed SME base.
- Establishing the network of European Digital Innovation Hubs.

- Future Manufacturing Ireland - developing Ireland's capabilities in advanced manufacturing and Industry 4.0.
- Advanced Manufacturing Supports - linking centres and capacity across all regions.
- Brexit Business Transformation through firm level supports – including delivery of the Agri-Food Transformation Fund.
- Expanding Enterprise Ireland's budget for research and development.
- Expanding IDA Regional Property Programme - attracting investment to regional locations.
- A National Design Centre - supporting market-led innovation in Irish-based enterprises to grow international sales.
- Seed and Venture Capital Funding - financing regional start-ups and growth.
- Delivery of the Disruptive Technologies Innovation Fund - spurring innovation and investment in cutting-edge technologies and future-focussed solutions.
- Space Technologies Programme – benefiting firms in the regions.
- Expansion of the National Institute for Bioprocessing Research and Training – scaling up capacity for a focus on personalised medicines.

To date the Department of Enterprise, Trade and Employment, through Enterprise Ireland, has approved over €126 million in funding to assist locally led regional enterprise development projects. Of this, €41.3 million has been approved for projects in the Southern Regional Assembly region under the Regional Enterprise Development Fund and the Regional Enterprise Transition Scheme.

In consultation with the Department of Public Expenditure and Reform, the Regional Assemblies and the Department of the Taoiseach, DETE will be launching new smart regional enterprise funding schemes over the coming months and years. This funding complements the aims and objectives of the Regional Enterprise Plans and the upcoming Smart Specialisation Strategy. With continued regional collaboration, potential applicants from the Southern Regional Assembly region are well positioned to compete for future funding calls to drive enterprise and employment development in the region.

2. Progress in enhancing overall economic performance, job creation and enterprise development having regard to the Regions' Cities and economic drivers

Economic Recovery Plan

The Government's Economic Recovery Plan (ERP), published at the beginning of June 2021, sets out the medium-term economic plan to rebuild Ireland's economy. As well as committing to a package of supports and investments to assist enterprise recovery, the Plan outlines a medium-term policy framework to rebuild sustainable enterprises, encourage job creation and sustainable and balanced post-pandemic growth, aligned with the Government's green and digital ambitions.

Longer term macro trends have been, in many cases, accelerated by the pandemic, including labour market changes and structural shifts in certain sectors. A key objective of the ERP is to

ensure that Ireland is prepared to realise the opportunities that these evolving trends will present and to enable the movement of firms and workers into expanding areas.

Pillar 1 - Ensuring robust, sustainable Public Finances - recognises that the ultimate foundation for a lasting recovery is macroeconomic stability and sustainable public finances. The plan is underpinned by substantial capital investment under the revised National Development Plan and €915 million expected in a first tranche of funding under the European Recovery and Resilience Facility.

Pillar 2 - Helping People Back into Work - commits to further strengthening Ireland's Skills Framework to ensure people are supported to secure and remain in sustainable and quality employment and ensure employers can access the skills they need. This will be achieved through a combination of upskilling and reskilling with substantially accelerated training and skills opportunities and increased activation capacity through Pathways to Work 2021-2025.

Pillar 3, Re-building Sustainable Enterprises - aims to create an environment for a jobs-led recovery. The Plan includes a target to exceed pre-crisis employment levels by having 2.5 million people in work by 2024. Crucially, these jobs will be more productive, innovative, resilient, more secure and valued, and include jobs in new areas of opportunity. A two-pronged recovery approach to rebuilding sustainable enterprises is outlined; supporting the domestic SME sector, which is critical to broad-based jobs-led economic growth, whilst leveraging the enormous strength of the Foreign Direct Investment (FDI) sector and diversifying and growing international trade.

The Plan includes a strong focus on driving enterprise resilience and competitiveness through an intensified focus on innovation and digital transformation and commitment to the green transition, including and assisting enterprise on its decarbonisation pathway and embracing new opportunities that this presents. The Plan also commits to the development of an overarching National Clustering Policy and Enabling Framework to ensure a strong impact from existing and future clusters in Ireland.

Pillar 4 - A Balanced and Inclusive Recovery, outlines the Government's commitment to recovering differently, through a balanced, sustainable, and inclusive approach for the population and regions. This will be achieved through an increased focus on building an inclusive society and labour market with greater emphasis on good quality employment and on increasing participation and reducing labour market barriers as the economy recovers. Pillar 4 also outlines how we will achieve an inclusive recovery with better regional balance, building on the Government's ambitious plans under Project Ireland 2040 for investment in rural towns and villages and objectives to realise the significant potential of Cork, Waterford, Limerick, and Galway to become regional economic drivers.

SME and Entrepreneurship Growth Plan

The SME and Entrepreneurship Growth Plan was developed by an SME Growth Taskforce of entrepreneurs, business leaders and other individuals uniquely positioned to contribute to a long-term vision for the SME sector. The Growth Plan, which was published in January 2021,

fulfilled a commitment within the 'Programme for Government – Our Shared Future' to draw up an ambitious long-term strategic blueprint for SMEs and entrepreneurs beyond COVID-19.

In February 2021, the Tánaiste and Minister for Enterprise, Trade and Employment established a Ministerial-led SME and Entrepreneurship Implementation Group to take forward the recommendations arising from the SME and Entrepreneurship Growth Plan.

The Implementation Group is co-chaired by the Minister for Employment Affairs and Retail Businesses, Damien English TD, and the Minister for Trade Promotion, Digital and Company Regulation, Robert Troy TD with additional support from the Chairs of the four SME Taskforce subgroups alongside officials from the Department of Enterprise, Trade and Employment and Enterprise Ireland.

The SME and Entrepreneurship Implementation Group met on six occasions between February and September, including a meeting with the wider SME Taskforce in September.

This engagement gave rise to the identification of ten priority areas where it is felt that significant development can be made in the shorter term. These include access to finance; digital transformation; increasing first time exporters; enhanced assistance for high-potential businesses; clustering and networks; SME management skills; reducing the regulatory burden on SMEs; delivery of a single portal for business information and assistance; ensuring comprehensive enterprise agency coverage for SMEs; and promoting SME participation in public procurement.

The SME and Entrepreneurship Implementation Group will continue to meet during 2022, to progress these and other recommendations, and will continue to engage with the Departments and Agencies with responsibility for the relevant actions. The Tánaiste will bring a Report on progress on the priority areas to Government in Q4 2022 and publish this Report thereafter.

Enterprise Ireland Client Employment Survey Results 2021

| | Metric | 2021 |
|-----------------|--------------------------------|-------------|
| Southern Region | Number of Businesses Supported | 1,231 |
| | Number of Jobs Supported | 69,277 |
| | Gross New Jobs Created | 7,149 |
| | Gross Jobs Lost | -3,311 |
| | Net New Jobs Created | 3,838 |

In the nine counties that encompass the southern region, (Waterford, Cork, Kerry, Clare, Limerick, Tipperary, Kilkenny, Carlow and Wexford), Enterprise Ireland clients had a very positive performance in 2021. Total employment within client companies stood at 69,277, this figure represents a 6% growth in employment across the region in the Enterprise Ireland client

base in 2021. In the Mid-West (Clare, Limerick, Tipperary) employment grew by 5%, in the South (Cork, Kerry) employment grew by 6%, and in the South-East (Carlow, Kilkenny, Waterford, Wexford) employment grew by 7% in 2021.

Across the region there were 7,149 jobs created by Enterprise Ireland clients in 2021, and after jobs losses were taken into account, there was a net increase in employment of 3,838 jobs.

Enterprise Ireland Payments to companies 2021

| Payments to Companies /County | 2021 |
|--------------------------------------|--------------------|
| Carlow | €5,159,056 |
| Clare | €5,255,724 |
| Cork | €26,456,359 |
| Kerry | €9,972,903 |
| Kilkenny | €1,728,846 |
| Limerick | €7,263,465 |
| Tipperary | €6,562,818 |
| Waterford | €3,742,226 |
| Wexford | €3,094,070 |
| Grand Total | €69,235,467 |

Companies located in the Southern region were paid in excess of €69 million during 2021. This support at company level allowed businesses across the region to deal with the challenges imposed upon them by Covid-19. Enterprise Ireland has been working with businesses throughout the region to ensure they can quickly recover from the impact of Covid-19 and continue to adapt to the new trading relationship with the UK. It is very important and welcome to see that the investments provided to companies in 2021 have led to job growth in every key economic sector and every region.

Enterprise Ireland Infrastructural Payments to 2021

| Payment €/County (Infrastructural clients) | 2021 |
|-------------------------------------------------------|-------------|
| Carlow | €273,081 |
| Clare | €2,151,627 |
| Cork | €2,509,366 |
| Kerry | €1,619,164 |

| | |
|--------------------|--------------------|
| Limerick | €1,404,652 |
| Tipperary | €223,000 |
| Waterford | €2,686,614 |
| Grand Total | €10,867,504 |

In addition to supporting companies directly Enterprise Ireland has been investing in the enterprise eco-system throughout 2021. These payments include investments towards community enterprise centres, innovation centres, and a wide range of other infrastructural items helps to stimulate and support enterprise, innovation, and job creation at a local, community and regional level.

LEO Employment Survey Results 2021

| LEOs | 2021 No. Clients | 2021 Gross Jobs (FT + OT) | 2021 Total Gains | 2021 Net Jobs |
|-------------------|------------------|---------------------------|------------------|---------------|
| Carlow | 203 | 1,015 | 265 | 47 |
| Clare | 230 | 1,330 | 278 | 153 |
| Cork City | 185 | 735 | 186 | 37 |
| Cork North & West | 286 | 1,373 | 306 | 130 |
| Cork South | 173 | 739 | 136 | 27 |
| Kerry | 285 | 1,272 | 313 | 145 |
| Limerick | 298 | 1,825 | 327 | 179 |
| Tipperary | 268 | 1,345 | 236 | 81 |
| Waterford | 280 | 1,199 | 289 | 108 |
| Total | 2,208 | 10,833 | 2,336 | 907 |

IDA 2020 and 2021 Regional Employment

IDA client companies directly employed almost 145,000 people outside of Dublin in 2020. Combined with indirect employment of 116,000, an estimated 260,000 jobs in the regions were supported by FDI in 2020.

| IDA Region | Direct | Indirect | Combined |
|--------------------------------------------------|--------|----------|----------|
| South-West (Cork & Kerry) | 46,009 | 36,807 | 82,816 |
| Mid-West (Clare, Limerick & Tipperary) | 24,169 | 19,335 | 43,504 |

| | | | |
|-----------------------------------------------------------|--------|--------|--------|
| South-East (Carlow, Kilkenny, Wexford & Waterford) | 13,461 | 10,769 | 24,230 |
|-----------------------------------------------------------|--------|--------|--------|

Source: DETE Employment Survey 2020; employment multiplier of 1.8

| IDA Region | Direct | Indirect | Combined |
|-----------------------------------------------------------|--------|----------|----------|
| South-West (Cork & Kerry) | 47,572 | 38,058 | 85,630 |
| Mid-West (Clare, Limerick & Tipperary) | 25,270 | 20,216 | 45,486 |
| South-East (Carlow, Kilkenny, Wexford & Waterford) | 14,932 | 11,946 | 26,878 |

Source: DETE Employment Survey 2021; employment multiplier of 1.8

Clients in regional locations had an annual spend of €7.9bn on payroll, €2.7bn on Irish services and €2.2bn on Irish materials in 2019. They contributed a further €1.3bn to in-house R&D.

| IDA Region | Payroll (M) | Irish Services | Irish Materials | In-house R&D |
|-----------------------------------------------------------|-------------|----------------|-----------------|--------------|
| South-West (Cork & Kerry) | 2,377 | 986 | 623 | 295 |
| Mid-West (Clare, Limerick & Tipperary) | 1,502 | 288 | 250 | 250 |
| South-East (Carlow, Kilkenny, Wexford & Waterford) | 621 | 211 | 187 | 129 |

Source: DETE ABSEI 2019, Survey of IDA Clients with greater than 10 employees. Some companies have multiple operations in Ireland and in a small number of cases, respond for the entire group rather than at individual establishment level. Due to rounding, some totals may not correspond with the sum of the separate figures.

| IDA Region | Payroll (M) | Irish Services | Irish Materials | In-house R&D |
|-----------------------------------------------------------|-------------|----------------|-----------------|--------------|
| South-West (Cork & Kerry) | 2,878 | 998 | 473 | 296 |
| Mid-West (Clare, Limerick & Tipperary) | 1,545 | 310 | 236 | 407 |
| South-East (Carlow, Kilkenny, Wexford & Waterford) | 881 | 182 | 178 | 88 |

Source: DETE ABSEI 2020, Survey of IDA Clients with greater than 10 employees. Some companies have multiple operations in Ireland and in a small number of cases, respond for the entire group rather than at individual establishment level. Due to rounding, some totals may not correspond with the sum of the separate figures.

These linkages support diverse, innovative and vital local economies. Amid an uncertain economic outlook following declines in output not seen outside wartime, IDA's priority is to stay close to and partner with existing clients on transformation to preserve their immense contribution to regional development through increased innovation, productivity, and resilience.

There are now close to 1,700 multinational operations supported by IDA in Ireland accounting directly for 11% of the Irish workforce. Their impact nationally and regionally to public finances, regional development, global value chain integration, spin-off indigenous enterprise, innovation can be clearly seen in their expenditure in the Irish economy. The most recent figures, from the forthcoming ABSEI results, which relate to 2020, show that payroll spend was €16.8bn, up 11%, combined spend of €11bn on materials and services sourced in Ireland up 6% to give a total spend in the Irish Economy of €27.9bn, up 8.8% on 2019. Exports were valued at €290.7bn, up 9.2% on 2019.

The 2021 figures show a pattern of sustained, robust growth in FDI investment and FDI-related employment over a continuous period of more than ten-years. This year's results represent a strong start to IDA's new 2021-2024 strategy, *Driving Recovery and Sustainable Growth*, which seeks to further enhance FDI's place at the centre of a resilient, sustainable, and inclusive Irish economy.

3. Progress on delivering the Regional Enterprise Plans (REPs)

Last year Minister of State for Business, Employment and Retail Damien English TD and Minister of State for Trade Promotion, Digital and Company Regulation Robert Troy TD launched the development of nine new Regional Enterprise Plans to 2024. These are bottom-up plans, developed by regional stakeholders including the Local Authorities, regional assemblies, the enterprise agencies, local enterprise offices, regional skills forums and education and training institutes, and others, in each region.

The Plans aim to identify growth opportunities, recognise vulnerabilities, and in response, strengthen the regional enterprise ecosystem to enable job creation in the regions and are additional to the ongoing work of the various bodies such as the IDA, Enterprise Ireland and others, and focus on collaborative smart initiatives aimed at job creation in the regions. The Southern Regional Assembly is a member of the Regional Enterprise Plan Steering Committees in the Mid-West, South-East and South-West. The new Plans will be published throughout Q1 2022, with confirmed dates for the Southern Region as follows:

- Mid-West – 18 February 2022
- South-East – 24 March 2022
- South-West – 22 March 2022

4. Progress made by the Department in developing sectoral supports

Retail Forum

The Retail Forum was established in June 2014 and provides a platform for engagement between retail representative bodies, retailers, the public sector on key concerns for the retail sector.

The purpose of the Forum is to allow key issues of relevance to the retail sector to be discussed, with a view to identifying practical actions which could be taken by Government, or by industry itself, to support the sector with particular emphasis on achieving sustainable jobs growth in the sector.

The Retail Forum meet quarterly and is chaired by Minister of State for Business, Employment and Retail Mr Damien English TD. Secretariat is provided by the Department of Enterprise, Trade and Employment.

During 2021 the Minister held 4 Retail Forum meetings and 9 retail grocery distribution sector roundtable meetings. The roundtable meetings focused on COVID-19 and Brexit.

Membership and minutes from Retail Forum meetings can be found on the Department's website <https://enterprise.gov.ie/en/What-We-Do/The-Business-Environment/Retail-and-Sector-Transformation/Retail-Forum.html>

Current priorities for the Retail Forum include

- Climate change, digitalisation, and the importance of skills development
- Undertaking a study on transformation in the retail sector under the auspices of the Retail Forum.
- Continuing to provide support to the Retail Sector during COVID-19 in line with public health guidelines.
- Supporting sustainable employment growth in the Retail Sector through continued engagement with the sector via the Retail Forum and its working groups.
- Respond to challenges and opportunities arising from disruptive changes including continuing to facilitate mutual engagement between the grocery retail and distribution sector (retail roundtable meetings chaired by Minister of State, Mr Damien English, TD) in relation to both COVID-19 and post Brexit.
- Advise on the Online Retail Scheme for 2022.

Future Manufacturing Ireland (FMI)

In 2021, Future Manufacturing Ireland (FMI) was set up as a new unit within the Innovation and Investment Division of the Department of Enterprise, Trade and Employment to ensure a coherent and cohesive national research support structure for Advanced Manufacturing.

Establishing this unit is one of the priority actions of the National Industry 4.0 Strategy (2020-2025) as well as commitments under Project Ireland 2040 and Future Jobs 2019. The unit will provide clarity for all stakeholders involved in manufacturing activities to access appropriate technology and research expertise, business and advisory services and funding supports. This includes domestic and international industry and the national ecosystem of R&D Centres involved in Advanced Manufacturing. Activities of the unit involve extensive interaction with the Agencies managing the network of centres and support infrastructure for Advanced Manufacturing; Science Foundation Ireland, Enterprise Ireland and IDA Ireland as well as close collaboration with the relevant centres and research providing organisations.

The Green Transition

DETE is engaged in a number of actions and initiatives, both directly and through its agencies, that will enhance and advance the green transition in enterprise.

DETE's direct actions include:

a) Accelerating the decarbonisation of the enterprise sector

The department recently been approved for EU funding in Ireland's National Recovery and Resilience Plan. The proposed programme under the NRRF has two components, the Carbon Reduction Fund and the Climate Enterprise Action Fund. For a project to address the imperative for decarbonisation across all businesses, particularly those SMEs that are unaware of their carbon footprint and get accelerated action on potential cost savings and abatement by incentivising the installation of Energy Metering and Monitoring Control Systems and increase the uptake of carbon neutral low/medium temperature heating in industry.

The proposed programme under the NRRF has two components, the Carbon Reduction Fund and the Climate Enterprise Action Fund as follows:

This project has two components:

1. The first aspect of this project includes incentives for the early stages of the carbon transition pathway for clients of Enterprise Ireland through the continuation of the Enterprise Ireland Climate Enterprise Action Fund. The total investment amount is €25m over the period from 2022-2026.
2. The second aspect of the project is for the investment in carbon measurement and abatement technologies for manufacturing enterprises (indigenous- and foreign-owned) to support their engagement in green research, development and innovation, capital investment, and capacity building with a focus on abating their high CO2 emissions. The total investment amount is €30m over the period from 2022-2026.

National Recovery and Resilience Fund – Funding 2022-2025

| | 2022 | 2023 | 2024 | 2025 ¹ | Total |
|--------------------------------|-----------|-----------|-----------|-------------------|-----------|
| | € m | € m | € m | € m | €m |
| Climate Enterprise Action Fund | 5 | 5 | 5 | 10 | 25 |
| Carbon Reduction Fund | 5 | 10 | 10 | 5 | 30 |
| Total RRF Funding | 10 | 15 | 15 | 15 | 55 |

The funds will be launched in 2022.

¹ The fund will be allocated in the period 2022-2025, with the drawdown expected to be concluded by 2026.

b) *Climate Toolkit 4 Business*

Officials in DETE and DECC have jointly developed an online tool that will assist businesses yet to commence reducing their environmental footprint, to take climate action. The Climate Toolkit 4 Business [climatetoolkit4business.gov.ie] helps any business get started, be informed on the implications for their business and access the available state resources applicable to their activities. It includes a simplified carbon calculator that generates an estimated carbon footprint for the user and also produces a plan of tailored actions recommended in response to the data provided by the user in the carbon calculator.

The target audience for the Toolkit is SMEs and micro enterprises that wish to begin their decarbonisation journey. It should be usable and useful for any business that does not yet have a sophisticated understanding of their carbon emissions and recommend the steps they should be considering to reduce them. The Toolkit will direct users to advice, grants and other resources available from the LEOs, EI, SEAI, Irish Water, EPA, IDA and others.

The Green4Micro funding scheme was launched in 2021. The objective of this programme is to help prepare small businesses for the low carbon, more resource efficient economy of the future. It supports clients employing 10 or less staff to engage a consultant to avail of advice and technical support, covering topics such as resource efficiency, understanding your carbon footprint and implementing an environmental management system.

5. Progress made by the Department relating to the enhancement of skills, talent, and innovation.

Responsibility for the Skills agenda now rests with the Department of Further and Higher Education, Research, Innovation and Science.

However, the projects within the remit of the Department of Enterprise, Trade and Employment below are relevant in this area:

DTIF and Innovation

The Disruptive Technologies Innovation Fund (DTIF) was established in 2018 as part of the National Development Plan and committed €500 million in funding over the period to 2027 for co-funded collaborative projects involving the enterprise and research sectors. DTIF projects focus on the development and deployment of disruptive technologies to deliver new solutions through investment in the development and implementation of innovative products and services that will alter markets, or the way business operates.

Since 2018, DTIF invested €235 million in 72 collaborative disruptive innovation projects with strong commercialisation potential under the first three calls of the Fund. Of these, 34 projects with one or more partners located in the Southern Region were awarded over €129m. The projects cover areas such as life sciences, medical devices, ICT, artificial intelligence, manufacturing, and environmental sustainability.

The Expert Group on Future Skills Needs (EGFSN) is the independent body tasked with advising the Government on the current and future skills needs of the Irish economy. Its Secretariat is based in the Department of Enterprise, Trade and Employment.

As part of its 2021 work programme, the EGFSN undertook a study on the nature and quantity of skills required between now and 2030 to deliver on some of the key enabling measures in the 2019 Climate Action Plan.

These are the targeting of 5GW of offshore renewable wind energy, an increase in onshore wind energy of up to 8.2GW, and the generation of up to 1.5GW of grid scale solar energy; the energy efficient retrofit of 500,000 residential homes to a minimum B2 Building Energy Rating; and the target of having 840,000 electric cars, as well as 95,000 commercial vehicles, on Irish roads.

According to the EGFSN's analysis, to deliver on the Climate Action Plan's 2030 targets, employment in wind and solar energy generation will have to quickly increase to 8,000, from a 3,000 baseline in 2020, within a number of years, and ultimately stand at 9,000 by 2030. This will mainly consist of workers in roles including Construction and Installation, Technicians and Technical Professionals, Engineering, Transport and Logistics, and Legal and Professional Services. The workforce engaged in residential retrofit and heat pump installation will similarly have to ramp up quickly and the existing motor mechanic workforce of c.15,000 will meanwhile need to be transitioned to work on Electric Vehicles as EV uptake increases.

Enterprise Ireland's Spotlight on Skills programme is run in partnership with the Department of Further and Higher Education, Research, Innovation & Science, and the Irish Management Institute. Spotlight on Skills is a key partnership that supports client companies to create a strategic workforce plan, with clearly identified critical skills needs and a pathway to address those skills needs. The outcomes from these workshops deepen Enterprise Ireland's understanding of the specific skills needs within client companies and in collaboration with the Regional Skills Forum Managers companies are supported to address their skills needs, through direct engagement with the Education, Skills Development & Training provision in the regions. Three Spotlight on Skills workshops were delivered in the South East/South West in 2021.

6. Please outline any progress made by agencies that operate under the aegis of your Department, in supporting the objectives of the RSES which are relevant to that agency.

IDA activity in the Southern Region:

IDA Ireland's New Strategy - Driving Recovery & Sustainable Growth 2021-2024

IDA's new strategy, launched in January 2021, represents a major contribution to national policy goals on advancing regional development. Despite a more challenging environment, the Agency will maintain the same high level of investment as targeted in IDA's previous strategy for each region of the country, guided by the focus in the NPF on building stronger regions and centres of scale.

In setting targets for each region, IDA considered key attractiveness factors including:

- critical mass of population and urban centres, in line with national policy,
- skill and talent availability,
- attractiveness, quality of life and placemaking,
- industry specific clusters and ecosystems,
- local infrastructure provision & connectivity,
- availability of property solutions (public and private sector), and
- alignment with IDA's sector and territory targets.

Based on the above criteria, IDA will aim to win investment for the main regional cities and the regional growth centres identified in the NPF. Each region of the country includes either a city or a regional growth centre. The Agency will also win investment for other locations that have the factors required to attract FDI, including areas of economic need.

IDA's new strategy, has been developed in the context of the Government's National Economic Plan. This strategy positions IDA to respond to the emerging trends that are accelerating because of the Covid-19 global pandemic. It identifies the opportunities for sustainable growth among IDA's established base of clients through a focus on transformative investments to increase the productivity of Irish operations and their workforce through RD&I, digitisation, training and actions on sustainability. Crucially it also maintains a focus on attracting the next generation of leading MNCs to locate in Ireland, further driving sustainable growth and maximising the impact of FDI in Ireland to 2024 and beyond.

The new strategy will be delivered through a focus on five pillars: Growth, Transformation, Regions, Sustainability, and Impact.

- ❖ Under the *Growth pillar*, IDA will win investment to support job creation & economic activity
- ❖ Under the *Transformation pillar*, IDA will partner with clients for future growth in Ireland
- ❖ Under the *Regions pillar*, IDA will win investment to advance regional development
- ❖ Under the *Sustainability pillar* IDA will embrace an inclusive and green recovery, and
- ❖ under the *Impact pillar*, IDA will maximise FDI's positive impact on local businesses and communities

These five interlinked pillars align with and are guided by the UN Sustainable Development Goals (SDGs).

Regions Pillar

Under the Regions pillar of Driving Recovery and Sustainable Growth, IDA will:

- Win investment to propel recovery and support development in each region
- Partner with existing regional clients to transform through innovation and upskilling

- Develop clusters to support transformation, spillovers and linkages.
- Collaborate with clients and stakeholders to facilitate remote working opportunities
- Continue to roll-out our essential regional property programme

Regional Initiatives

Regional development is at the centre of IDA’s new strategy. The Agency is committed to the pursuit of more balanced, compact regional development which can deliver complementary efficiency and equity gains, with the overall impact of helping to advance national development. IDA will target half of all investments (400) from 2021- 2024 to regional locations and maintain the same high level of investment as targeted in IDA’s previous strategy for each region of the country.

During 2021, 249 investments were won, 104 were new name investments. Growth in Regions was particularly buoyant with 53% - 133 projects of the 249 investments won going to regional locations. IDA Ireland’s results for 2021, showed that total employment in IDA client companies in Ireland now stands at 275,384, up 16,826 on 2020, the highest Foreign Direct Investment (FDI) employment level ever. Employment growth was recorded in every region of the country.

| IDA Region | 2020 | 2021 | Growth |
|-----------------------------------------------------------------|-------------|-------------|---------------|
| South-West (Cork & Kerry) | 46,009 | 47,572 | + 3% |
| Mid-West (Clare, Limerick & Tipperary) | 24,169 | 25,270 | + 5% |
| South-East (Carlow, Kilkenny, Wexford & Waterford) | 13,461 | 14,932 | + 8% |

FDI cannot be the sole contributor in addressing the challenges facing Ireland’s regions – from Brexit to Covid-19, digital transformation to the climate transition – but it can have a significant impact in propelling economic recovery and realising more balanced growth.

There are:

- 218 IDA client companies in the South-West Region, employing 47,572 people
- 79 IDA client companies in the South-East region, employing 14,932 people
- 150 IDA client companies in the Mid-West Region, employing 25,270 people.

The FDI performance in these regions has been consistent over the past five years with employment among IDA clients increasing by 25%. All three IDA Regions have significant

ecosystems of well-established companies across Technology, Life Sciences, International Financial Services and Engineering & Industrial Technologies, which are complemented by research centres that help win new business and assist existing clients with transformation. The Mid-West also won significant investment in the Food and the Film sub-sectors.

IDA Ireland continues to win investment across all these sectors, which has contributed significantly to employment growth and positive economic impacts on other sectors of the economy. These regions also benefit hugely from the direct and indirect employment generated by IDA client companies located in other bordering regions, including the cities of Cork, Galway, Kilkenny and Waterford.

Table 1: IDA Clients and Employment by County, 2021

| <i>County</i> | <i>No. of companies</i> | <i>Total Employment</i> |
|-------------------------------|-------------------------|-------------------------|
| <i>Cork</i> | <i>200</i> | <i>45,604</i> |
| <i>Kerry</i> | <i>18</i> | <i>1,968</i> |
| <i>Total SW region</i> | <i>218</i> | <i>47,572</i> |
| <i>Waterford</i> | <i>41</i> | <i>8,868</i> |
| <i>Wexford</i> | <i>25</i> | <i>3,750</i> |
| <i>Carlow</i> | <i>4</i> | <i>1,477</i> |
| <i>Kilkenny</i> | <i>9</i> | <i>837</i> |
| <i>Total SE region</i> | <i>79</i> | <i>14,932</i> |
| <i>Limerick</i> | <i>66</i> | <i>13,824</i> |
| <i>Clare</i> | <i>71</i> | <i>6,924</i> |
| <i>Tipperary</i> | <i>13</i> | <i>4,522</i> |
| <i>Total MW region</i> | <i>150</i> | <i>25,270</i> |

Source: Employment Survey 2021

Enterprise Ireland activity in the Southern Region:

Enterprise Ireland works with over 1,710 companies employing more than 69,700 people in the Southern Region. Between 2018-2020, Enterprise Ireland invested €133.5m in companies in the Southern region supporting employment creation, innovation, competitiveness, and expansion. Enterprise Ireland supports the international growth and scale of Irish enterprises; assists Irish enterprises to achieve sustainable competitive advantage through customer-led innovation and digitalisation; helps them meet the challenges and opportunities of climate change, sustainability, digitalisation; and supports the successful initiation and growth of new start-ups and first-time exporters across the Southern Region.

The success of Irish-grown companies, from entrepreneurship through to start-up, scale-up and global success requires regional enterprise development supports such as accelerators, enterprise centres and industry clusters. Since 2017, Through the Regional Enterprise Development Fund, Enterprise Ireland has committed over €40m to support important regional enterprise development initiatives and investments across the Southern Region. These ambitious enterprise development projects will be significant catalysts and economic drivers for the Southern Region. They include projects such the Ludgate Hub in Skibbereen; the Clare Maritime Enterprise Zone in Kilrush; the RDI Hub in Kilorglin; the Emerald Aero Cluster in Shannon; Irish Bio Economy Initiative in Tipperary, Kinetic labs in Waterford; the National Design Innovation Hub in Kilkenny/Carlow and the Tradebridge initiative in Wexford.

Enterprise Centres are another critical enterprise development support to which Enterprise Ireland has committed significant funding over several years. In 2020, €2m in development funding was allocated to 25 Enterprise Centres in the Southern Region in response to Covid 19.

Strong regional clustering is important to enhancing regional enterprise success. Under the Regional Technology Cluster Fund, Enterprise Ireland approved funding to the South East Engineering Cluster, the Cyber Security SME Cluster, the IDEAM Cluster in TUS, the Agritech Cluster and the South West Circular Economy Cluster. The region's existing clusters – Emerald Aviation Cluster, IT@Cork and Kerry SciTech - continue to strengthen and grow supported under the REDF funding.

Supporting entrepreneurship and innovation across all regions is central to Enterprise Ireland's regional development strategy. Enterprise Ireland's activities in this regard include the New Frontiers entrepreneur development programme delivered via Institutes of Technology and Technological Universities across the Southern Region. Enterprise Ireland continues to support, through collaboration and funding, the region's centres of excellence including Insurtech, 3D WIT, Lean 4.0 Centre, Centre for Design and Kinetic Labs.

Enterprise Ireland's Technology Gateways, in partnership with Institutes of Technology and Technological Universities provide companies of all sizes with access to highly skilled and industrially focused researchers, together with specialist equipment and facilities. Eight of Enterprise Ireland's 16 Technology Gateways are based in the Southern Region delivering innovation expertise and solutions for Irish industry. These include the Pharmaceutical & Molecular Biotechnology Research Centre (PMBRC), the South Eastern Applied Materials Research Centre (SEAM), the Telecommunications Software and Systems Group gateway (TSSG); Design+ in Carlow; CAPP, Nimbus, IMAR in MTU and Shannon Applied Biotechnology (ABC) in TUS.

LEOs activity in the Southern Region:

The 2021 data is not available until sometime in February as LEOs continue to record their performance on GMIS. LEOs activity in the Southern Region for 2020 is as follows:

| | Carlow | Clare | Cork City | Cork North & West | Cork South | Kerry | Kilkenny | Limerick | Tipperary | Waterford | Wexford |
|-----------------------------------------------------|--------|-------|-----------|-------------------|------------|-------|----------|----------|-----------|-----------|---------|
| Measure One Grants | | | | | | | | | | | |
| No. of Measure 1 Projects Approved | 19 | 33 | 31 | 21 | 34 | 20 | 29 | 54 | 56 | 48 | 30 |
| Measure Two Capability Development | | | | | | | | | | | |
| No. of Training Participants | 2,242 | 897 | 2509 | 1820 | 2936 | 3073 | 1,676 | 3,215 | 1,372 | 2,417 | 2,133 |
| Mentoring Participants | 256 | 350 | 229 | 844 | 388 | 153 | 1,133 | 276 | 437 | 655 | 212 |
| Lean4Micro Participants | 29 | 12 | 0 | 0 | 0 | 0 | 7 | 46 | 35 | 8 | 0 |
| Other Initiatives | | | | | | | | | | | |
| Second Level Student Participation | 437 | 235 | 660 | 1071 | 288 | 719 | 747 | 1,265 | 2,425 | 694 | 1,170 |
| EI Targets | | | | | | | | | | | |
| Agile R&D Approval | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 2 | 1 | 1 | 1 |
| Protocol Partner Targets | | | | | | | | | | | |
| Micro Finance Ireland Applications submitted by LEO | 20 | 30 | 11 | 13 | 10 | 54 | 25 | 30 | 26 | 29 | 46 |
| Trading Online Vouchers Approved | 161 | 401 | 534 | 458 | 389 | 482 | 302 | 468 | 446 | 459 | 476 |

7. Please provide details of any policy initiatives/developments that have been finalised or are in preparatory stages that support the objectives of the RSES

National Clustering Policy and Framework

Work has commenced on the development of a National Clustering Policy and Framework, which is an important deliverable under Ireland's Economic Recovery Plan. Through the development of a national clustering policy the Department of Enterprise, Trade and Employment seeks to establish a cohesive and strategic national approach to enabling cluster development to maximise the potential of clustering to deliver enterprise policy objectives including supporting the green and digital transition.

National Digital Strategy

The Government launched the new National Digital Strategy *Harnessing Digital - The Digital Ireland Framework* on 1st February 2022. The Strategy sets out a high-level framework to support our ambition for Ireland to be a digital leader, at the heart of European and global digital developments.

It sets out a pathway to drive and enable the digital transition across the economy and society, to maximise the well-being of our citizens, the efficiency of public services, the productivity and innovation of enterprise, as well as our overall competitiveness. The Strategy places a strong emphasis on balance, inclusiveness, security and safety, underpinned by a coherent governance structure and a modern, cohesive, well-resourced regulatory framework.

The NDS emphasises the importance of crucial enablers across digital infrastructure, namely universal connectivity and robust cyber security capacity and expertise. It recognises the need for skills development across society so that all can engage with and benefit from digitalisation. It will drive the further digitalisation of public services through the creation of a trusted, user-driven, inclusive and efficient world-leading digital government service, with a particular focus on the digitalisation of the health system.

Brexit and Covid supports

A wide range of loans and grants has been provided by the Department of Enterprise, Trade and Employment in 2020 and 2021 in the context of Covid and Brexit. The total amounts to just over €1.7 billion.

A full list of these loans and grants is available on the Department's website [COVID-19 and Brexit Business Supports 2022 - DETE \(enterprise.gov.ie\)](#).

8. Summary of the funding programmes administered by your Department (or agency under the aegis of your Department), over the last two years, which have been awarded within the Southern Region:

DTIF Call 3 - Funded Projects based in Southern Region

| County | Project name and short description | Amount awarded | Status of project |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------------------|
| Dublin and Cork | The CAMEO project aims to unlock the potential of Earth Observation data for non-specialist users by creating a new architecture with the aim of developing a sustainable internationally trading Earth Observation services sector in Ireland. | €6.4m | Commenced |
| Cork, Dublin | The GUARD project will use artificial intelligence to develop drones to detect drug smuggling. | €5.1m | Commenced |
| Dublin, Cork | The PERCEIVE system will use catheter sensor technology to significantly increase atrial fibrillation treatment efficacy and safety while reducing the enormous burden on healthcare systems globally. | €5.1m | Pre-contract |
| Galway, Cork and Dublin | The ENACT project is an outpatient solution without side effects to deliver next generation therapeutic and gene therapies for gastrointestinal cancer. | €4.78m | Commenced |
| Limerick, Dublin, Cork, and Offaly | The goal of the TRIDENT project is to develop a low-cost, high-performance sodium-ion smart battery system using entirely sustainable materials and processes. | €3.65m | Commenced |
| Clare and Dublin | The Ostic project mission is to deliver an adhesive that will stick broken bone tissue together following fracture and then facilitate rapid healing and repair of the bone. | €3.4m | Commenced |
| Galway, Cork and Dublin | RELAY will develop and commercialise a disruptive large-bore vascular closure device that will become the new standard of care for catheter-based surgeries. | €2.89m | Pre-contract |

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| Clare, Dublin and Limerick | Design and build a prototype robotic drilling system and anchor template for the installation of micropiled anchor foundations; anchors will be load tested to prove suitability; for a wide range of applications including offshore wind. | €2.88m | Commenced |
| Galway and Clare | A smart, patient-centric catheter-based solution for treating malignant pleural effusion "fluid on the lung" in the home resulting in improved autonomy of care. | €2.87m | Commenced |
| Limerick, Clare and Cork | SAFETYBOT will realize Artificial Intelligence enabled safety solutions to service the Factory of the Future, enabling immersive collaboration between human workers, robots and automation equipment. | €2.85m | Pre-contract |
| Dublin and Cork | Using nanotechnology to generate 40% energy/emissions savings in thermal management of commercial and industrial cooling/heating systems, e.g., data centres and high energy technologies. | €2.85m | Commenced |
| Galway and Cork | Develop a minimally invasive and intelligent microwave ablation catheter for treatment of lung cancer. | €2.68m | Commenced |
| Cork | Develop a monitoring tool to allow clinicians to directly monitor foetal oxygenation and diagnose foetal hypoxemia, enabling more precise monitoring of foetal well-being and increasing new-born surveillance during delivery. | €2.63m | Commenced |
| Galway and Clare | The LILY project will deliver the world's first pain-free, patient-led treatment to prevent chemotherapy induced alopecia, considerably improving the quality of life of patients undergoing chemotherapy. | €2.17m | Pre-contract |
| Westmeath, Cork and Meath | The objective of the PerPET project is to transform the plastics industry: drastically reducing the amount of fresh petroleum extracted virgin material used, and positioning PET | €1.89m | Commenced |

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| | recyclate as a valuable, perpetually reusable resource. | | |
| Dublin and Cork | The goal of the PERSONA project is to develop the first innovative plasma sampling device for inflammatory diseases. | €1.57m | Commenced |
| Dublin, Cork and Donegal | E-Crop will develop innovative agri-technologies that provide farmers and agri-advisory industries with the tools needed to monitor and improve crop health | €1.5m | Commenced |

Regional Enterprise Development Fund (REDF) Call 3 – 2020 only included

Regional Enterprise Transition Scheme (RETS) - 2021

| County | Project name and description | Amount awarded | Status of project |
|--------|--------------------------------------------------------------------------------------------------------|----------------------------------------------------|-------------------|
| Kerry | AgriTech Centre of Excellence. Development of a Global Agritech Centre of Excellence. | RETS: €206,380 | Operational. |
| Kerry | KerrySciTech. Enterprise cluster to support the growth of science and technology. | REDF: €236,500 (Call 1) REDF: €120,000 (Call 3) | Operational. |
| Kerry | Mol Teic CLG. Community Enterprise job creation initiative. | RETS: €259,520 | Operational. |
| Kerry | Firies Business Hub DAC. Food production hub for start-ups and small businesses. | REDF: €1,151,190 (Call 3) RETS: €130,920 | In progress. |
| Kerry | RDI Hub. Digital Innovation Hub. | RETS: €135,200 | Operational. |
| Kerry | Sneem Innovation and Technology Services CLG. Enterprise Centre/Digital Hub. | RETS: €62,000 | Operational. |
| Cork | Cork Urban Enterprises. Enterprise development hub. | RETS: €83,200 | Operational. |
| Cork | Benchspace Cork CLG. Social enterprise to help those in the creative sector. | REDF: €342,256 (Call 3) | In progress. |
| Cork | IT@Cork. Cluster development initiative for the ICT sector. | RETS: €91,200 | Operational. |
| Cork | Ludgate Operations CLG Digital Hub/Innovation centre | RETS: €108,637 | In progress. |
| Cork | Seirbhísí Forbartha Gnó DAC. Enterprise space and office accommodation for rural enterprise. | REDF: €2,700,000 (Call 3) | In progress |
| Cork | SynbioHub DAC. | REDF: €3,063,000 (Call 3) | In progress. |

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|-----------|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------|
| | Life Sciences 'BioHub'. | | |
| Limerick | Emerald Aero Cluster CLG. Aerospace cluster development. | REDF: €250,000 (Call 1) REDF: €350,560 (Call 3) | Operational. |
| Limerick | BNest Social Initiative DAC. Project to develop business capability of social entrepreneurs. | RETS: €126,720 | Operational. |
| Waterford | Incupharm. Lab facilities for the Life Sciences sector. | RETS: €81,446 | Operational. |
| Waterford | ThreeD DAC. 3D Manufacturing facility. | RETS: €124,800 | Operational. |
| Waterford | South East Economic Development Company Ltd. Project to create a Lean Industry 4.0 facility. | REDF: €1,342,751 (Call 3) | In progress. |
| Waterford | Crystal Valley Tech DAC. ICT Industry cluster. | REDF: €215,919 (Call 3) | In progress. |
| Wexford | The Tradebridge Collaboration DAC. Develop export market opportunities for SMEs located in South East and SE Georgia, USA. | REDF: €247,827 (Call 3) | Operational. |
| Carlow | National Design Innovation Hub (t/a Team Rural). Rural entrepreneurship and ecosystem development initiative | REDF: €396,800 (Call 3) | In progress. |
| Tipperary | Tipperary Innovation Engine. Co-working space provision. | REDF: €500,000 (Call 3) | In progress. |
| Clare | Future Mobility Campus CLG. Provision of CAV Test facility. | REDF: €4,723,197 (Call 3) RETS: €823,606 | Operational. |

Small Business Assistance Scheme for COVID

| County | Project name and description | Amount awarded | Status of project |
|-------------|------------------------------------------------------------------------------------------------------|----------------|------------------------------|
| | SBASC 1 and SBASC 2 – grants for SMEs to assist with fixed costs associated with running a business. | | Both schemes are now closed. |
| Carlow | | €246,000 | |
| Tipperary | | €623,000 | |
| Waterford | | €565,000 | |
| Wexford | | €760,000 | |
| Kilkenny | | €438,000 | |
| Cork City | | €1,174,000 | |
| Cork County | | €1,259,000 | |

| | | | |
|----------|--|------------|--|
| Kerry | | €704,000 | |
| Clare | | €583,000 | |
| Limerick | | €1,040,000 | |

| Funding programme | County | Amount awarded | Project name and short description | Status of project |
|-------------------------------------------------|-----------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Sustaining Enterprise Fund | Cork | €21,060,000 | Helping Irish businesses to rebuild after the impact of Covid-19 – providing the funding they need to stabilise cashflow, adapt their operations and innovate to meet new customer needs. | Open until June 2022 |
| | Kerry | €7,951,000 | | |
| | Limerick | €7,800,000 | | |
| | Tipperary | €6,184,000 | | |
| | Wexford | €4,725,000 | | |
| | Carlow | €4,425,000 | | |
| | Clare | €3,465,000 | | |
| | Waterford | €2,925,000 | | |
| Capital Investment Scheme Agricultural Products | Cork | €19,849,996 | The aim of this fund is to advance product and/or market diversification among primary food processing companies and strengthen the resilience of companies vulnerable to the external trading environment. | Now closed |
| | Kilkenny | €4,104,250 | | |
| | Tipperary | €596,377 | | |
| | Waterford | €4,031,805 | | |
| | Wexford | €1,988,519 | | |
| R&D Fund | Carlow | €315,249 | Supports the development of new and/ or improved products, processes and/ or services | Open |
| | Clare | €1,407,665 | | |
| | Cork | €7,300,469 | | |
| | Kerry | €1,080,014 | | |
| | Kilkenny | €848,871 | | |
| | Limerick | €884,405 | | |
| | Wexford | €250,000 | | |
| Disruptive Technology Innovation Fund | Clare | €3,484,844 | collaborative enterprise-driven partnerships that will develop, deploy and commercialise disruptive technologies to transform business. | Open |
| | Cork | €3,667,501 | | |
| | Kerry | €593,380 | | |
| | Limerick | €1,551,528 | | |