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Eastern and Midland Regional Assembly

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National Smart Specialisation Strategy (S3) Consultation Paper

The Eastern and Midland Regional Assembly (EMRA) welcomes the opportunity to participate in the consultation by the Department of Enterprise Trade and Employment (DETE) to inform the development of a Smart Specialisation Strategy (S3) which is an enabling condition to qualify for European Regional Development Fund (ERDF) Programmes for 2021-27. EMRA, together with the two other Regional Assemblies in Ireland, is currently involved in the preparation of the future 2021-2027 ERDF programmes for Ireland.

EMRA are also responsible for the preparation and implementation of the Regional Spatial and Economic Strategy (RSES) for the Eastern and Midland Region[1]. A primary statutory objective of the RSES is to support at a regional level, the implementation of Project Ireland 2040 - National Planning Framework (NPF)[2] and National Development Plan (NDP). The RSESs set out a long-term framework for spatial planning and economic development in the three Irish Regions and as such will be fundamental to the formulation of the National Smart Specialisation Strategy.

EMRA's observations are structured around the format of the National S3 Consultation Paper, highlighting the key role of the Assemblies in developing the RSES and next round of ERDF Regional Programmes (RP), the importance of aligning with the statutory policies in the RSES and setting out a socio-economic profile of the Regions key strengths and challenges, a response to the identified cross-cutting issues, and supporting appendices including a socio-economic evidence base of the Region

EMRA further welcomes the request from DETE for specific input from the Regional Assemblies and draws attention to the following text and analysis in Section 2, which will inform the chapters of S3 that focus on the Irish Regions, and to set out a vision to improve the regional impact of Ireland's S3:

- **Vision of S3 in Ireland** – embedding a Regional Approach (section 2.1)
- **Research and Innovation (R&I) Assets** - the Region's Institutional Context (section 2.3)
- **Sectoral Strengths, Opportunities and Challenges** - Regional Economic Context (Section 2.4)

Key High-Level Points in EMRA's S3 submission include the following considerations for S3;

- **Set a clear vision for Ireland's S3 as a 'living' document that provides for 'place-based' oversight of research and innovation (R&I) performance and apply a 'bottom up' approach in alignment with the Regional Spatial and Economic Strategies (RSESs)** by Ireland's 3 Regional Assemblies, creating a new opportunity for the regional level to play a strengthened role linking national and local R&I efforts. as recommended by the Hunter Report: 'Expert advice and support on Smart Specialisation Strategy (RIS3) in Ireland'[3]

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[1] https://emra.ie/dubh/wp-content/uploads/2020/05/EMRA_RSES_1.4.5web.pdf
[2] https://npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf
[3] By Alison Hunter, Director Economic and Public Policy Consultancy (EPPC) for the European Commission

- **Develop a Regional Approach to S3 building on work already undertaken by Regional Assemblies to ensure a consistent approach to regional innovation across the Irish Regions,** in line with the recommendations of the Babel Report 'Regional Approach for development of a Smart Specialisation Strategy' commissioned by the Southern Regional Assembly.
- **Embed a wider evidence based and iterative Entrepreneurial Discovery Process (EDP**) **and a collaborative governance model** with industry and key stakeholders to identify priority areas at regional and subregional level for smart specialisation, which should be reviewed regularly to align with changing economic conditions with regular monitoring, potentially linked to the Regional Assemblies' Regional Development Monitor.
- **Key role of the Assemblies in preparing and implementing the statutory Regional Spatial and Economic Strategies (RSES).** More specifically, the RSES for the Eastern and Midland Region (EMR) was adopted in 2019 and outlines the spatial, economic and climate policies for the EMR within the context of an investment framework to 2031, and as such is fundamental to the formulation of the National S3 Strategy
- **Key role of the Assemblies / RSES in developing ERDF Regional Programme (RP).** EMRA are collaborating closely with the Southern Regional Assembly (SRA) and the relevant government departments to design and implement the ERDF Programme that will cover both the Eastern & Midland and Southern Regions. The Regional Assemblies can provide a balanced governance mechanism for co-investment combining the bottom-up discovery of opportunities with top-down European ambitions.
- **Ensure alignment with S3 and ERDF to promote a 'Smart' 'Green' 'Just' Transition** with a focus on the urban dimension and to strengthen economic and social cohesion between regions. The ERDF – and other funding mechanisms including EU, Project Ireland 2040, and enterprise funds – will be instrumental in ensuring implementation of national and regional strategies to drive collaboration, skills and innovation and economic opportunity for all.
- **Ensure alignment with S3 and the Settlement Strategy of the RSES/NPF** specifically, to target the industrial strengths of the designated metropolitan areas, regional growth centres and key towns, to achieve critical mass in urban centres of scale, address key deficits and promote balanced regional development. This can be linked to RSES priorities of placemaking, urban regeneration and a just, green, and digital transition.
- **Ensure alignment with S3 and the Economic Strategy of the RSES, which is underpinned by S3 and a strategic approach to Clustering** to reinforce Regions not only in their most advanced industrial sectors but also to diversify their economic bases in areas with the most socio-economic potential, and to address identified societal challenges.
- **Promote the development of Smart Regions, cities and towns and develop a network of enterprise and co-working hubs of scale in the EMR**, capitalising on the Dublin-Belfast Economic Corridor and developing synergies with higher level institutes to develop skills and innovation, promote employment growth and placemaking to revitalise urban centres, build economic resilience and support COVID recovery.

1. Role and Functions of the Regional Assembly

The EMRA is part of the regional tier of governance in Ireland. It is primarily focused on driving regional development through the formulation, adoption, and implementation of the Regional Spatial and Economic Strategy (RSES), oversight and coordination of County Development Plans and Local Economic and Community Plans, management of EU Programmes, EU project participation, implementation of national economic policy, and additional functions working with the National Oversight and Audit Commission.

The RSES for the Eastern and Midland Region (EMR) was made in June 2019. The overall vision of the Strategy is to create a sustainable and competitive Region that supports the health and wellbeing of our people and places, from urban to rural, with access to quality housing, travel and employment

opportunity for all. The vision is supported by 16 Regional Strategic Outcomes (RSOs) that are framed around three key principles of Healthy Placemaking, Climate Action and Economic Opportunity.

Along with the three-fold ambition for the Region in the RSES of healthy placemaking, economic opportunities and climate action, EMRA works to grow the profile of the Region and drive the regional agenda at home and abroad, working with our stakeholders to shape policymaking, to enhance local, regional, national and EU coordination and collaboration, and to lead and build scalable region wide partnerships. As a strategic policy body, EMRA participates in the consultation processes of relevant strategic plans and policies of the government.

1.1 ERDF Programme for the Southern, Eastern and Midland Region

EMRA are currently engaging with the Department of Public Expenditure and Reform (DEPR) and the European Commission to prepare the ERDF Programme for the Southern, Eastern and Midland Region. The Southern, Eastern and Midland Regional Programme (RP) has been framed in the context of EU Cohesion Policy Objectives and the European Regional Development (ERDF) Fund for the 2021 – 2027 programming period, which seeks to strengthen economic & social cohesion between regions with a focus on the urban dimension[4] and policy areas such as:

- Research, innovation capacity and uptake of advanced technologies
- Benefits of digitization for citizens, government, and companies
- Developing skills for smart specialization, industrial transition, and entrepreneurship
- SME competitiveness and growth
- Energy efficiency, renewable energy
- Climate Change adaptation, risk prevention
- Enhancing green infrastructure, reducing pollution

These first three policy areas are also part of PO1 "smarter Europe" for which having a S3 is an enabling condition or prerequisite to qualify for draw down of funding opportunities.

On this basis, the Southern, Eastern and Midland ROP 2021– 2027 outlines a development strategy, including a clear set of investment priorities to meet the current development challenges within these strategic areas. Such priorities consider the specific needs of the Southern Region (SR) and the Eastern and Midland Region (EMR) within the context of the European Commission's "*2019[5] and 2020[6] Semester: Country Report – Ireland*" (hereafter – Country Report), while aligning with key priorities outlined in the National Planning Framework (NPF), the Regional Spatial and Economic Strategies (RSES) of the EMR and the SR[7], their relevant Metropolitan Area Strategic Plans (MASP), including the Dublin Metropolitan Area Strategic Plan in the EMR and other key government strategies.

The intervention logic underpinning the future ERDF programme for the Eastern & Midland and Southern Regions will be based on the needs and opportunities identified in the regions' respective RSES. **A regional approach to S3 would therefore reinforce the links between the strategies and the future ERDF programmes and the overall alignment which is in line with European objectives**.

1.2   The RSES for the Eastern and Midland Region 2019-2031

The RSES for the Eastern and Midland Region was adopted in June 2019 and **sets out the long term spatial, economic and climate policies for the Region within the context of an investment framework**. The RSES provides a:

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[4] Integrated Sustainable Urban Development s a key objective of the new Leipzig charter, which brings together for first time the principles of integrated, participative, place based urban development

[5] https://ec.europa.eu/info/sites/info/files/file_import/2019-european-semester-country-report-ireland_en.pdf

[6] https://ec.europa.eu/info/sites/info/files/2020-european_semester_country-report-ireland_en.pdf

[7] http://www.southernassembly.ie/uploads/general-files/Southern%20Regional%20Assembly%20RSES%202020%20High%20Res.pdf

- **Spatial Strategy** – to manage future growth and ensure the creation of healthy and attractive places to live and work – See Appendix C
- **Dublin Metropolitan Area Strategic Plan (MASP)–** to ensure continued competitiveness of Dublin and a supply of strategic development for sustainable growth
- **Economic Strategy** – that builds on our strengths to create a strong economy and jobs, that ensures a good living standard and economic opportunity for all – See Appendix B
- **Climate Action Strategy** – to accelerate action and ensure a clean and healthy environment, sustainable transport, and green infrastructure.
- **Investment Framework** – to prioritise the delivery of infrastructure and enabling services by government and state agencies

This is the first time that Irish planning has delivered an economic strategy intrinsic to a regional spatial plan. **The Economic Strategy of the RSES is based on five key principles, including Smart Specialisation** and a strategic approach to Clustering not only to reinforce Regions in their most advanced industrial sectors but also to diversify their economic bases in a smart way, in areas with the most socio-economic potential. This is underpinned by Orderly Growth as set out in RSES Spatial Strategy, investment in Placemaking to create attractive places to attract and retain talent, and Future Proofing to build economic resilience to external shocks and challenges – See Appendix B.

The spatial strategy in the NPF and the RSESs sets out a 50:50 distribution of growth between the Eastern and Midland Region, and the Southern and Northern and Western Regions. It seeks to achieve more **compact growth as an alternative to urban sprawl, allowing for more sustainable settlement and mobility patterns and developing economies of scale** that can provide a counterbalance to the Greater Dublin Area's economy. Ambitious compact growth targets are set in the RSESs, with at least 50% of all new homes that are targeted in each of Ireland's five metropolitan areas to be delivered within their existing built-up footprints, and a target of at least 30% in other urban areas.

To enable the development of urban centres of scale, **the RSES Spatial Strategy seeks to better manage the growth of the Dublin Metropolitan Area,** the regional growth centres of **Athlone, Dundalk, and Drogheda,** and supported by a selected network of large self-sustaining **Key Towns**, which have the identified assets and capacity to act as regional drivers for growth – See Appendix C

The RSES is strongly aligned to Europe's objectives and the national spatial, economic and climate policies of the Government to **drive policy alignment from EU, national, regional, to local level in Ireland, and to ensure that funding follows policy** by providing a framework for investment in the Regions. The RSES also provides the policy framework for the preparation of Local Authority City and County Development Plans and Local Economic and Community Plan (LECPs). The RSESs seek to optimise the potential of the regions providing an evidence place-based approach for growth and how it will be directed and managed over the next decade.

1.3   Regional Development Monitor

As part of the implementation of the RSES, the three Regional Assemblies of Ireland are developing an **annual "Regional Development Monitor", with the view of tracking a series of socio-economic variables to monitor how each of the three regions perform i**n achieving the policies and objectives outlined within their appropriate RSES. The "Regional Development Monitor" is being prepared to align with the monitoring procedures of Project Ireland 2040, the NPF, and in conjunction with the Department of Housing, Local Government and Heritage (DHLGH).

The "Regional Development Monitor" will analyse trends in selected socio-economic variables to monitor the delivery of the RSESs and wider national policy including Project Ireland 2040, at different spatial scales and may support **ongoing going monitoring and evaluation of sectoral strengths as part of a Regional S3 Strategy**. See also Appendix A- key indicators and economic profile of the Region.

2.   Submission

The observations of the Assembly generally follow the structure of the National S3 Consultation Paper, with this section setting out the observations of the Assembly in response to the Introduction and Strategic Context for the preparation of the new S3 for Ireland, the Regional Institutional Context and Economic Context for Smart Specialisation. The next section addresses identified Cross Cutting Issues.

2.1 Strategic and Economic Context for the preparation of the new S3

The Regional Assembly notes the context that is set out in the Introduction to the Smart Specialisation Consultation Paper for the preparation of a national or regional smart specialisation strategy (S3) as a key enabling condition to qualify for European Regional Development Fund (ERDF) Programme for 2021-27. This section could be further strengthened by more focus on the **role of the Regional Assemblies** and the inclusion of context to **explain the wider benefits of S3**.

In this regard the *'Regional Smart Specialisation Position Paper'[8] (*Hunter,2021) commissioned by the Northern and Western Regional Assembly (NWRA) highlights the multiple benefits of S3 and makes recommendations for a place-based approach to S3, highlighting an opportunity to **build on Regional Spatial and Economic Strategies (RSES)** and governance and tap into both local and regional strengths, by mobilising and concentrating knowledge, assets, and capacity for growth.

2.1.1   Vision of S3 in Ireland – embedding a Regional Approach

The three Regional Assemblies of Ireland feel that a regional approach should be adopted to complement Ireland's S3 process. Utilising regional knowledge and building on each region's unique competitive advantages will only assist in rebuilding our region's economies following the outbreak of COVID-19.

This is evident from the Hunter report – "Expert Advice and Support on Smart Specialisation Strategy (RIS3) in Ireland" – by the Economic and Public Policy Consultancy (EPPC). The report highlights that: *"Ireland will require to adopt a more strategic and cohesive approach to Smart Specialisation if it is to benefit from this agenda. This is likely to challenge established 'thinking' concerning the future direction for the country's wider R&I policy framework. Five key topics should be addressed which will support the country to make the shift necessary. These are: governance, place-based focus to policy making, cooperation, digitalisation and a revised SME support programme"*.

Insights from this report highlight the need for a more regionally focused S3 and the importance of the regions and the RSES in this regard. Specifically, the report notes that:

- **Ireland's approach to research and innovation (R&I) is strongly centrally driven** by the national government. Therefore, it lacks sensitivity to and awareness of local issues (both successes and challenges).
- The recently launched RSESs offer an opportunity to **re-orient the country's R&I governance with a stronger place-based focus.** This could also address the concern expressed by several regional actors during the consultation programme of being 'left behind' in relation to targeted R&I capacity building support and investment, especially in rural Ireland.
- **A 'place-based' emphasis generates value by identifying and connecting the many local examples of R&I excellence which exist across the country** e.g. in clusters and Institutes of Technology, which are often not very visible. By connecting these efforts, the country can help to overcome both market size challenges and reduce fragmentation of effort. In

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8 https://www.nwra.ie/wp-content/uploads/2020/12/regional-smart-specialisation-paper.pdf

addition, this can support Ireland to create a stronger presence and profile as an EU R&I 'front-runner', improving opportunities to boost innovation efforts with EU partners.

By bringing a regional dimension to Ireland's S3, policy makers can utilise funding resources in a more efficient manner, allowing regions to utilise self-identified competitive advantages for the economic benefit of their own geographical areas. This would enable using a sector or cluster-like policy concept not only to reinforce regions in their most advanced industrial sectors, but also to diversify their economic bases in a smart way, in the most promising areas with the most socio-economic potential.

Furthermore, a regional approach to Ireland's S3 would align with the economic strategies of the RSESs, with "Smart Specialisation" being one of the key economic principles adopted in each of these high-level statutory frameworks. **In doing so, adopting a regional approach to S3 in Ireland would have a statutory basis through the RSESs.**

2.1.2 The Babel Report "A Regional Approach for the Development of a S3 Strategy"

The National S3 should also be informed by the work undertaken by the Southern Regional Assembly (SRA) namely the *'Regional Approach for the Development of a Smart Specialisation Strategy in the Southern Region'* (Bable, 2021).

The Bable Report sets out evidence-based recommendations for potential S3 priority areas based on regional assets and capabilities, the entrepreneurial environment and benchmarking. The Report also sets out a methodology to inform **a consistent approach to Regional S3** across the Irish Regions**, which is industry led and part of an iterative Entrepreneurial Discovery (EDP) Process** with key stakeholders to set a shared vision and roadmaps for Industrial Transformation of key sectors.

The Babel Report was informed by a stakeholder engagement process with the public sector, private companies, research centres and clusters. It sets out a detailed regional profile and sectoral analysis and identifies key strengths by NUTS III sub-region, along with challenges and opportunities and areas of Technology Specialisation The analysis identifies potential priority areas for the Southern Region, including target sectors and key stakeholders, who need to be involved in the further development of the area into a smart specialisation area for the region, as well as the external opportunities for each area, including EU Research and Green Deal opportunities. Next steps include:

- **Set out a vision** for the regional smart specialisation approach together with the local eco-system to align with the implementation of the RSES and Smart Regions
- **Set up a collaborative governance model** to ensure continuous stakeholder engagement throughout strategy development and implementation
- **Set up indicators for monitoring** and evaluation of the strategy as part of an iterative process that responds to changing market dynamics and regional ecosystem conditions

The Report also **profiles the Technological Advantages of the three Irish Regions**, based on an analysis of patents registered showing shared technological advantages among the Regions and presenting an opportunity to identify specific complementary areas for cross-regional collaboration, differentiation, and specialisation. The Report identifies 'niche' technology areas with high transformative potential, and notes that the **Eastern and Midland Region (EMR) specialises in the development of ICT devices and biotechnologies and Audio-visual technology.**

Consequently, it is suggested that the Regional Assemblies, through their statutory role in implementing RSES, supporting delivery of Project Ireland 2040 and the ERDF Programmes, **are ideally positioned to drive an iterative place-based Regional Dimension to Ireland's S3** that would increase the impact of the National S3 by tapping into local and regional networks.

2.2   European Framework for Smart Specialisation

EMRA notes the inclusion of context in relation to European Programmes including Cohesion Policy, Horizon 2020, and Green Deal. This is welcomed and could be further strengthened by **more focus on the role of Regional Assemblies in the preparation of the future ERDF programmes** for Ireland 2021-2027. More specifically, EMRA is collaborating closely with SRA to design and implement the ERDF Programme that will cover both the Eastern & Midland (EMR) and Southern Regions (SR).

There is a need to provide further detail on **linkages between S3 to RSES and ERDF.** The intervention logic underpinning the future ERDF programme for the Eastern & Midland and Southern Regions will be based on the needs and opportunities identified in the regions' respective RSES. A regional approach to S3 would therefore reinforce the links between the strategies and the future ERDF programmes and the overall alignment which is in line with European objectives.

The ERDF – and other funding mechanisms – will be instrumental in ensuring the implementation of key national and regional strategies. The Regional Assemblies, as part of our role in developing the next round of ERDF funding have also examined relevant economic and environmental indicators to identify **the key development challenges facing both the SR and the EMR which will assist in addressing regional disparities and delivering effective regional development in Ireland**.

Some of these challenges are set out in further detail in Section 2.4.4.

2.3   Regional Enterprise Innovation context

EMRA welcomes the recognition given in the Consultation Paper to the role of the **RSES as a key policy driver for S3**, providing an evidence and place-based approach for managing and directing future growth and investment at a NUTS 2 Regional level, including ERDF Funding for Regional Programmes.

EDP needs to be wider and embedded. There is an opportunity to build on the work undertaken by SRA in parallel with the preparation of the Babel Report and to develop an iterative and evidence based regional approach to S3 approach in collaboration with stakeholders. By applying a **regional dimension to Ireland's S3**, policymakers can utilise capital funding in a more efficient manner, allowing Regions to capitalise on self-identified competitive advantages for their own economic benefit and leveraging the role of the Regional Assemblies in managing European Regional Development Fund (ERDF). A Regional S3 Framework can also integrate the territorial dimension for a cohesive S3 and promotes a multi-level governance model by providing a bridge between EU, National and Local policy.

The consultation document also highlights the **role of the Regional Enterprise Plans (REPs**) in translating national policy at a NUTS 3 Sub-Regional level. A set out in the RSES, EMRA supports the current round of Regional Enterprise Plans to focus on;

- Support a high level of economic success throughout the region by building on local strengths and regional innovation capacity
- Position and support the growth of the Midlands as an advanced manufacturing centre of excellence.
- Leverage opportunities in big data and data analytics from iLOFAR.
- Ensure that the Midlands is well positioned to address the challenges posed by the transition to a low carbon economy and renewable energy
- Increase enterprise engagement in innovation, research and development to ensure Dublin's continued competitiveness and productivity.
- Build a pipeline of sustainable and scalable start-ups in Dublin and provide quality support
- Develop the Mid-East as a hub for the Screen Content Creation Sector

- Build an ecosystem framework to support the financial services, payments and agri-food sectors throughout the Region
- Develop a network of innovative co-working spaces in the region to mitigate long commuting times, promote remote working opportunities and life-style benefits.

It is further noted that Smart Specialisation is a key economic principle that is underpinning both RSESs and REPs, and that **EMRA are currently engaging in the stakeholder engagement process to develop the new round of REPs** that will complement the preparation of the new S3. EMRA also have a **statutory role in the oversight and co-ordination of the upcoming round of Local Authority Local Economic and Community Plans (LECPS)**.

2.3.1 Research and Innovation Participants of S3

This section outlines the key agencies and institutions that are relevant to the sectoral and research landscape in the EMR. These agencies and institutions have been listed based on the important role they play in supporting research and development, innovation, and economic growth across our regions, highlighting their importance for the S3 process in Ireland

See also Appendix E Enterprise Development and Innovation Assets

It is important to note that the categorisation of key individual research centres and technology centres are based on the location of the host institution; albeit these centres have developed key partnerships with other institutions and agencies outside of their respective NUTS 2 Region.

The following agencies and institutions are relevant to the sectoral and research landscape of the Eastern and Midland Region:

- University College Dublin
- Dublin City University
- Trinity College Dublin
- Technological University Dublin
- Institute of Art, Design & Technology
- Maynooth University
- Dundalk Institute of Technology
- Athlone Institute of Technology

- Government Departments
- Higher Education Authority
- SEAI
- EI
- EPA
- IDA
- SFI
- Teagasc

Key research centres, technology gateways and technology centres based in the EMR include:

- ADAPT, SFI Research Centre for AI-Driven Digital Content Technology
- AMBER, SFI Research Centre for Advanced Materials and Bio-Engineering Research
- BEACON, SFI Research Centre for Bioeconomy
- CONNECT, SFI Research Centre for Future Networks and Communications
- FutureNeuro, SFI Research Centre for Neurological Diseases
- iCRAG, SFI Research Centre in Applied Geosciences
- I-Form, SFI Research Centre for Advanced Manufacturing
- APT, EI Technology Gateway for Polymer Technologies
- COMAND, EI Technology Gateway for Connected Media
- CREDIT, EI Technology Gateway for Energy Efficiency and Optimisation
- CREST, EI Technology Gateway for Coatings Innovations
- MICRA, EI Technology Gateway for Bio Diagnostics
- DESIGN+, EI Technology Gateway for Applied Design
- CeADAR, Technology Centre for Applied Data Analytics & Machine Intelligence
- Learnovate, Technology Centre for Learning Technologies
- IMR, Technology Centre for Manfacturing

- Food for Health Ireland, Technology Centre for Food Innovation
- MTI, Technology Centre for strategic research and innovation in beef and sheep meat processing in Ireland

2.4 Sectoral Strengths, Opportunities, and Challenges - Regional Economic Context for S3

The consultation document provides a regional profiles and key strengths and opportunities for each of Ireland's three Regions. For the Eastern and Midland Region (EMR), key sectoral strengths are identified as; ICT; Advanced Manufacturing; Financial Services/Fin Tech; Engineering; BioPharma/Life Sciences; Food/Agri-Tech; and Audio-visual. Emerging areas of opportunity for EMR are identified in ICT; Fintech; and Low Carbon Economy.

In response to consultation questions the Regional Assembly would **welcome more clarity as to the basis for which these key sectors were identified** and suggests that a regional approach to S3 could be taken in order to further **refine and review priority smart specialisation sectors to align with changing economic conditions**.

EMRA further considers the list of **Sectoral Opportunities should be expanded (and be non-exhaustive) and aligned with the RSES**. The SRA's Babel report identifies an evidence-based methodology to further refine the Region's sectoral strengths and to identify priority smart specialisation areas at regional and subregional level in collaboration with key stakeholders. Priority areas need to be reviewed and updated regularly to align with the changing market dynamics and regional ecosystem conditions as recommended in both the Bable and Hunter reports.

It is recommended that the S3 be linked to the economic policies of the RSES in alignment with the spatial and sectoral priorities as set out below and in the Appendices to this submission.

2.4.1 Delivery of RSES Spatial Strategy (Ensuring Spatial Alignment with RSES)

To enable the ambition and potential of the Region's Economic Engines, **the RSES Spatial Strategy prioritises investment and reforms in key locations of scale** that support their wider hinterlands in order to build critical mass (and diversity) in population and the enterprise base of settlements to attract and retain investment and talent.

This includes championing the **metropolitan area of Dublin** as a smart, climate-resilient and global city region; securing **Athlone, Drogheda and Dundalk as Regional Growth Centres**, acting as regional economic drivers and supports for their wider catchment areas; and promoting a network of large economically active **Key Towns** that provide employment and services to their surrounding areas. All of this is supported by **Self-Sustaining Growth Towns**, **Self-Sustaining Towns** and a network of multifaceted **Rural Places**.

There is a need for prioritisation of investment in placemaking and regeneration, in making places socially inclusive and attractive for enterprise, which is complemented through ensuring critical mass in these key locations and developing sectoral clustering, driven by effective collaborations, and built around investments in research.

See also Appendix C – RSES Settlement Strategy.

2.4.2 Sectoral Opportunities for the Region's Economic Engines as set out in the RSES (Ensuring Alignment with RSES Economic Strategy)

For a country of Ireland's scale, **many sectoral strategies are developed at national level** however, smart specialisation can only work if choices are based on real knowledge of local potential and if the right actors are involved, therefore a bottom-up approach is also necessary.

For instance, when considering the development of sectoral opportunities, it is important to consider the past and current industrial composition in that particular location, along with **place-specific needs** from particular industries, such as proximity to energy infrastructure, water capacity, availability of talent, proximity to public transport, access to international markets through airports and ports, serviced lands, local clusters, supply chains and economies of scale.

The RSES sets out a non-exhaustive list of **Sectoral Opportunities** for the Region's Economic Engines, which should be considered in the regional economic context for Smart Specialisation. **Based on information from REPs, LECPs, localised enterprise strategies and other stakeholders** with regards to the presence of strong sectors in their localities and considering sectoral growth trends, a list of sectoral opportunities has been identified for Dublin, Dublin-Belfast Economic corridor, Regional Growth Centres, towns and villages.

These are set out in Appendix D and summarised below:

Dublin Metropolitan Area. As Ireland's Capital with international visibility, Dublin plays a key role as a location of choice for mobile investment. Dublin as national economic driver is the only city in Ireland with international scale and competes with other cities based throughout Europe and internationally. It hosts a variety of enterprises with large concentration of multi-nationals; a large number of universities, institutes and research centres with a young and well-educated population. All these features translates into a strong capacity to attract FDI, and drive new business formation - start-ups - and a high concentration of organisations dedicated to R&D, which suggests a critical mass of businesses in a healthy ecosystem of innovation and entrepreneurship. A coordinated and strategic approach to deliver a smart city would not only elevate Ireland's visibility internationally, but also provide a seed-bed for start-ups and a test bed for the deployment of disruptive technologies.

- *Sectoral opportunities Dublin and Eastern SPAs* Having regard to the strengths of its own enterprise base, Dublin should explore opportunities for further development on Fintech, CorpTech, personalised and regenerative medicine, internet of things, artificial intelligence, cybersecurity, technology consulting, sharing economy, international education services, investment management and administration, and marine energy. The Dublin Regional Enterprise strategy (2017-2019) identifies key sectors and employment levels, together with the clustering of activity and supports across the Region, including: administration; professional services; tourism and leisure; education and training; manufacturing and industry; transport and logistics; construction; information and communication technology; and, retail and wholesale. Current REPs and LECPs identify manufacturing, distribution and logistics, technology, pharmaceutical, equine foods, and creative industries/film.

Dublin – Belfast Economic Corridor. The Dublin-Belfast Economic Corridor is a key element in the development strategy of the RSES and connects the two main cities of scale on the Island, with Drogheda, Dundalk and Newry and a combined population of more than 3.3 million people. The Corridor has the capacity to provide the only potential paired city growth pole of scale on the Island to compete with similar city regions in the EU. The imperative to counteract BREXIT with a proactive spatial economic policy adds to the international significance of the Corridor. It also provides opportunities to further FDI, for example with the Louth Pharma hub at the centre of the Corridor, and the e-payments cluster. By increasing its critical mass, population and jobs growth will take place in a sustainable growth pattern focused on clusters and smart specialisation, in line with the Region's Economic and Settlement Strategy. The Corridor also offers extended strategic connections throughout the Island through links with the TEN-T network and the Dublin- Rosslare route.

- ***Sectoral Opportunities Dublin-Belfast Economic Corridor (including Dundalk and Drogheda)*** Advanced manufacturing, smart manufacturing, biopharma, bioprocessing, applied nanotechnology, alcoholic beverages, marine energy, energy storage, wind energy, advance manufacturing, experiential tourism, and Fintech.

Regional Growth Centres (RGCs): Athlone, Drogheda and Dundalk. The role of these RGCs within the RSES is to serve as focal point to gain critical mass and to deliver positive impacts to their surrounding areas and enhance overall regional and national growth. A coordinated approach to infrastructure investment will build critical mass and facilitate effective movement of goods and people internationally and nationally. The presence of Third level institutes in Athlone and Dundalk can play an increasingly strong role as key drivers of economic growth. These Technology and Innovation Poles envisage building facilities, developing the expertise and capabilities of the Institutes of Technologies (IoTs) working with Enterprise Ireland (EI) and IDA. The IoTs can play a key role as drivers of enterprise activity across the Regions through inter-institutional connections and impactful collaboration.

- ***Sectoral Opportunities Midlands (including Athlone)*** Advanced manufacturing, smart manufacturing, medical devices, implanted devices, pharma/bio, food and engineered products, advanced composite materials, applied nanotechnology, technology consulting, Food and Beverage Industry including sustainable foods, meat products, agri-biologicals, bio-refining, bio-conversion, biotechnology, smart construction, Tourism including experiential tourism, precision farming, global engineering services outsourcing, drug delivery services, renewable energy, Big Data and Data Analytics.

Key Towns, Self- Sustaining Growth Towns and Self- Sustaining Towns. The RSES Growth Strategy set out in Chapter 3 and settlement hierarchy in Chapter 4 identifies Key Towns, Self- Sustaining Growth Towns and Self- Sustaining Towns, the latter categories being defined at county development plan stage. Key towns, strong market/sub county towns are locations that have an economic function that provides employment for their surrounding areas and have a wide catchment. In many cases these areas have varying economies and sectors and the Strategy will support their sustainable growth.

New business formation and innovation in rural areas depend on drivers such as the presence of human capital, proximity and access to higher education institutions, ICT infrastructure including broadband, transport infrastructure and the presence of a wide sectoral mix. The Partnership Companies, Local Community Development Committees (LCDCs), Local Enterprise Centres and LECPs in rural areas should prioritise regeneration of town and village cores, promotion of local industry and enable the ambition of all places and enhance quality of life.

The above sectoral opportunities should be complemented by investment in specific sectors identified as labour-intensive economic activities which are of particular importance the the Region owing to the COVID-19 economic crisis and Brexit. These sectors include
- retail,
- tourism,
- marine,
- low carbon economy, and
- agriculture

The approach taken in identifying sectoral opportunities at a regional and sub-regional level should build on the RSES and **apply an evidence and asset based Regional Approach as part of an Entrepreneurial Discovery Process** as set out in the RSES, and as recommended in the Hunter and Bable Reports.

2.4.3 Regional Economic Context for S3

This section will provide an overview of the economic context of EMRA as one of the three NUTS 2 Regions in Ireland, providing a general **overview of the performance of the Region's economy** and examining the latest **economic development challenges in areas that are relevant to S3 process**.

Although the Eastern and Midland Region (EMR) – as the main driver of growth in the Irish economy –performs relatively well across several key economic indicators, the Region is also currently experiencing significant development challenges, particularly at a NUTS 3 Regional level. These challenges are evident from several economic indicators – including but not limited to disposable income and deprivation rates – but also other indicators related to the productive capacity of the region's economy, including the distribution of urban centres, research and innovation capacity, high-value added sectors, third level attainment rates and exporting capabilities.

As of 2019, disposable income per capita in the EMR was estimated to be €24,781, which was above the State average of €22,519. That said, disposable income varied significantly across NUTS 3 Regions; with above average levels in Dublin (€27,045 per head of population) and the Mid-East (€23,294) but low levels in the Midlands (€18,017). Over the past decade, there has been rising level of inter-regional disparities, with the difference in disposable income per capita between Dublin and the Midlands increasing from a gap of €3,201 per capita in 2009 to a gap of €9,028 in 2019. Such disparities can be credited to the fact that disposable income levels in Dublin and the Mid-East rose substantially during this time, by 28.5% and 19.3% respectively, which is significantly higher relative to the Midlands (+1%). Overall, disposable income per capita in the EMR rose by 22.7% between 2009 and 2019.

Despite experiencing significant growth in recent years, a key economic development challenge facing the region's economy is its notably high deprivation rates, with the degree of severity varying at a NUTS 3 Regional level. As of 2019, the percentage of people experiencing deprivation in the EMR was 17.7%, which was marginally below the State average of 17.8% and the second highest out of the three NUTS 2 Regions of Ireland. Of the three NUTS 3 Regions of the Region, the Mid-East recorded the highest deprivation rate in 2019, with 19.7% of its residents experiencing enforced deprivation, with an above average deprivation rate also recorded in the Midlands at 18.7%. Although the Dublin region's economy has experienced significant growth in recent years, it should be noted that 16.5% of its residents experienced enforced deprivation as of 2019[9].

See Appendix A for a list of socio-economic indicators for the Region which have informed this submission.

2.4.4 Economic Development Challenges

Interlinked with these performances are **development challenges related to the productive capacity of the region's economy**, with some high-level challenges that are relevant to the S3 process identified in terms of research and innovation capacity, and to a lesser extent in terms of competitiveness, but also sub-regional challenges with respect to, urban centres of scale, high value added sectors, skills, export capabilities and digital infrastructure.

The Regional Assemblies, as part of our role in developing the next round of ERDF funding have also identified key development challenges facing both the SR and the EMR which are aligned to the Indecon Needs Analysis and Country Report[10] for ERDF/ESF+ funding and – if addressed – would assist in implementing key national and regional strategies, including the National Planning Framework

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[9] https://data.cso.ie/table/SIA51
[10] https://esif.ie/wp-content/uploads/2020/07/Needs-Analysis_for-ESF-ERDF-Funding_Indecon_Final-Report_-July_2020-1.pdf

(NPF) , the Regional Spatial and Economic Strategies (RSES) of the EMR and the SR , their relevant Metropolitan Area Strategic Plans (MASP) and other relevant strategies.

A number of key development challenges facing the Region are summarised below:

• **Research and Innovation Capacity:** As per the findings of the EU's Regional Innovation Scoreboard (RIS) 2019, the EMR is considered a "Strong + Innovator"[11]. Despite this, the Region's index score has decreased in both absolute and relative terms since 2011[12]. Notwithstanding this decline, the EMR continues to perform above both the State and EU average, with index scores of 102.2 and 110.5 respectively. Relative to the EU average in 2019, the Region underperforms across innovation indicators, such as trademark applications, innovative SMEs collaborating with others, lifelong learning, non-R&D expenditure in the business sector, R&D expenditure in business and public sectors, sales of new-to-market and new-to-firm innovations, design applications and EPO patent applications.

• **Competitiveness and Exporting:** The EMR performs relatively well with respect to competitiveness, with the Region ranked the 89th most competitive region in the EU, as per the findings of the Regional Competitiveness Index 2019. In this regard, the Region records an above average performance across a host of competitiveness indicators – including infrastructure, innovation, education, and technological readiness – albeit the Region underperforms relative to its peer regions with respect to labour market efficiency and market size. Such a performance is reflective of the degree to which the EMR trades with international markets. As per the latest available export intensity statistics, the Region is the most export-oriented NUTS 2 Region in Ireland, recording an export intensity of 79.7% which was above the State average of 77.4%. That said, the Mid-East – with an export intensity of 63.6% – was the only NUTS 3 Region of the EMR with an export intensity rate below the State average.

Enhancing the Region's research and innovation capacity is in line with the RSES, Future Jobs Ireland[13] and the Irish Research Council's Strategy 2020-2024[14], with the Indecon Needs Analysis Report highlighting the need for measures to support an increase in research and development (R&D) expenditure and supports to increase collaboration between industry and the Higher Education (HEI) sector. Development challenges relating to the Irish R&I system include the level of expenditure R&D, the structure of public support for business R&D and the level of cooperation between enterprises and research bodies. Some of these challenges are reflected in the EMR's performance with respect to the EU Regional Innovation Scoreboard (RIS) 2019[15].

• **Urban Centres of Scale:** The development of urban centres of scale – through implementation of the NPF and RSES spatial strategy and compact growth targets – will be instrumental to ensuring sustainable regional development, addressing the lack of urban structure outside of the Greater Dublin Area (GDA) and tackling regional disparities. The lack of urban centres of scale in some parts of the Region are reflected in the latest NUTS 2 and NUTS 3 Regional population density statistics.

Given the historical migration of people, employment, and housing to the GDA, it is predictable that the EMR's population density has been consistently above the Irish and EU 27 average. In 2019, the EMR recorded 170 residents per square km as of 2019, which was above the Irish average of 72 and EU average of 109. That said, this varied on a NUTS 3 Regional level, with a notably high population density recorded in Dublin (1,513 residents per square km), with below average ratios registered in both the Mid-East (106) and more so for the Midlands (47). To allow for sustainable settlement patterns in the Dublin Metropolitan Area, and to ensure the Mid-East and the Midlands can provide a counterbalance to the expected growth trajectory of the Dublin region; it is imperative that sufficient

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[11] https://ec.europa.eu/growth/sites/growth/files/ris2019.pdf

[12] https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/base-profile/eastern-and-midlands

[13] https://dbei.gov.ie/en/Publications/Publication-files/Future-Jobs-Ireland-2019.pdf

[14] https://research.ie/assets/uploads/2020/01/Irish-Research-Council-Strategic-Plan-2020-2024.pdf

[15] https://interactivetool.eu/RIS/RIS_2.html#b

resources are provided to deliver the compact growth targets outlined in the NPF, the RSES and the Dublin MASP; thereby supporting effective regional development across all parts of the EMR.

• **High Value-Added Sectors:** Although the Eastern and Midland Region's economy is specialised in various high-value added and export-oriented sectors such as Information and Communication, Medical and Clean Technologies, Industrial Products and Chemicals, Bio- pharma and Financial and Business Services, much of these enterprises are notably concentrated in Dublin. As a share of total employment and relative to the national average, the Mid-East was less reliant on sectors involved in "Medium High / High Manufacturing and Knowledge Intensive Services", with these sectors accounting for 50.2% of the Mid-East's employment base, as of Q4 2020. The Midlands also recorded a below average proportions of jobs in these sectors – with these types of jobs accounting for 44.4% of the sub-region's employment base in Q4 2020 – with the Midlands far more reliant – relative to the nation– on low value-added sectors such as Agriculture and Accommodation and Food Services[16].

• **Skills Development:** The need to support skills development is identified in the RSES, the National Skills Strategy 2025[17], Future Jobs Ireland[18] and Technology Skills 2022[19]. Support for the Region's Higher Education (HEIs) and Further Education and Training (FET) providers are key to tackling skills deficits, supporting skills development and reskilling/ upskilling opportunities. As of 2020, 55% of adults in the EMR had a third level qualification, which was 4 percentage points above the State average of 51%. That said, such results varied on a NUTS 3 Regional level, with Dublin recording the highest third level attainment rate out of the eight NUTS 3 Regions of Ireland, with a rate of 62%, with below average rates recorded in both the Mid-East (48%) and the Midlands (40%). Notably, the Midland's third level attainment rate was the lowest out of all eight NUTS 3 Regions of Ireland.

Higher lifelong learning participation rates will be instrumental to ensuring that the EMR's economy continues to be based on knowledge intensive and high skilled services and activities. In 2019, 14.5% of adults in the EMR took part in lifelong learning activities, higher than the State average (12.6%) and the EU 27 average (10.8%), but notably lower relative to other leading regions in Sweden, Finland, Denmark, France, Iceland, the Netherlands and Norway. Although some progress has been made in addressing skills development in Ireland, skills deficits – particularly digital skills – remain a significant development challenge facing the Region, with further detail set out below.

• **Digital Infrastructure and Skills:** The provision of high-speed broadband is essential to the delivery of the NPF, the RSESs and the government's rural development strategy "Our Rural Future" which aims to – amongst other things – close the gap in urban-rural digital connectivity. As of 2020, 90% of households based in the EMR recorded a fixed broadband connection rate, which was the highest out of the three NUTS 2 Regions and above the State average of 85%. That said, broadband connectivity rates varied on a sub-regional level, with households based in urban oriented NUTS 3 Regions – such as Dublin and the Mid-East – registering above average and high fixed broadband connections rates of 92% and 90% respectively, while the Midlands – which is predominantly a rural oriented NUTS 3 Region – recorded a below average connection rate of 80%[20].

The lack of access to high-speed broadband – particularly in rural communities – has contributed to regional disparities in terms of skilled labour, productivity levels and competitiveness, as per the findings of the *Country Report*. In terms of digital skills, the EMR is the leading NUTS 2 Region in Ireland, with the region home to some of the largest ICT companies in the world, as evident from the region's above average reliance on jobs in Information and Communications Activities (7.8% employment

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[16] Based on Q4 2020 Labour Force Survey
[17] https://www.education.ie/en/Publications/Policy-Reports/pub_national_skills_strategy_2025.pdf
[18] https://dbei.gov.ie/en/Publications/Publication-files/Future-Jobs-Ireland-2019.pdf
[19] https://www.education.ie/en/Publications/Policy-Reports/technology-skills-2022.pdf
[20] NUTS 2 data obtained through a private request from the CSO: NUTS 3 data available in the attached link.
https://www.cso.ie/en/releasesandpublications/ep/p-isshh/informationsocietystatistics-households2020/householdinternetconnectivity/

versus State average of 6% in Q4 2020). Notwithstanding this, tackling relatively low levels of basic digital skills will be an ongoing development challenge for the region, as evident from the fact that:

- 65% of individuals based in the EMR used the internet to exchange information and services with government and public administrations in 2020, which is higher than the State average (62%) but lower compared to leading regions in Denmark, Norway and Sweden.
- 84% of individuals based in the EMR used the internet to order goods or services for private use in 2020, which is higher than the State average (74%) but lower relative to leading regions in Iceland, Denmark, Finland, Sweden and Norway.
- 78% of individuals based in the EMR used internet banking in 2020, which is higher than the State average (69%) but significantly lower relative to leading regions in Netherlands, Denmark, Iceland, Finland, Sweden and Norway.

• **Just Transition, Energy Efficiency and Sustainable Mobility.** The transition to a low carbon economy will require significant public and private investment, particularly in decarbonising sectors that account for large shares of emissions – such as housing and transport – and ensuring a just transition to local communities overly reliant on exposed industries. Development challenges documented in the Country Report, the NPF, the RSES, the Climate Action Plan and the Indecon Needs Analysis – include improving the energy efficiency of public and private buildings, providing greater accessibility and interconnectivity to sustainable modes of travel and supporting employment and reskilling opportunities to address employment losses as Bord na Móna transitions away from peat extraction activities in the Midlands; and specific rural areas in the Mid-East.

In March 2019[21], it was estimated that approximately 4,000 additional households in the Midlands alone could be impacted – either directly or indirectly – by the phasing out of peat extraction; a significantly large impact considering the Midland's total employment base amounted to 140,200 as of Q4 2020[22]. The RSES advocates for new initiatives – such as lifelong learning and upskilling programmes, appropriate business supports and peatland rehabilitation / re-wetting – to mitigate this economic impact. Further detail on EMRA's role in driving a Just Transition is set out in Section 3.2.1.

Given that the EMR is Ireland's largest and most urbanised NUTS 2 Region and considering the compact growth targets set out in the NPF and the RSESs, the need to promote sustainable transport, including walking and cycling is a significant priority. As of 2016, 68.3% of Dublin's population had access to highly frequent public transport[23] at their nearest public transport stop, well above the State average of 29.6%. That said, notable proportions of the EMR's population did not have access to highly frequent public transport modes, with below average and low access registered in the Mid-East (20.8%[24]) and the Midlands (16.2%), and below average percentage of active travel in the Mid-East (14.6% of commuters either walked or cycled) and the Midlands (12.3%).

Entwined with these challenges is the need to address high commute times experienced by residents of the EMR. The highest one-way commute times in Ireland were recorded in each of the NUTS 3 Regions of the EMR namely, the Midlands (29 minutes), Dublin (31 minutes) and the Mid-East (34 minutes[25]), all above the state average of 28 minutes in 2019. Furthermore, 11.2% of commuters in

[21] https://data.oireachtas.ie/ie/oireachtas/committee/dail/32/joint_committee_on_climate_action/reports/2019/2019-03-28_report-climate-change-a-cross-party-consensus-for-action_en.pdf
[22] https://www.cso.ie/en/releasesandpublications/er/lfs/labourforcesurveylfsquarter42020/
[23] Luas, bus or train with over 50 departures a day
[24] Access to highly frequency public transport modes at their nearest public transport stop
[25] https://www.cso.ie/en/releasesandpublications/br/b-lfstb/labourforcesurveybulletinmainplaceofworkandcommutingtimein2019/

Ireland had a journey time of 60 minutes or more in 2019[26], with above average in each of the NUTS 3 Regions of the EMR, with the Mid-East – at 19.4% – recording the highest proportion in Ireland.

The decarbonisation of the EMR's residential market represents a significant development challenge. Although the EMR – specifically in Dublin and the Mid-East – recorded above average proportions of households with a BER between A" and "B", these proportions continue to remain notably low; with lower proportions recorded in rural counties in the Midlands. Households in Dublin and the Mid-East were generally not dependent on using solid fuels as their household's heating fuel source.

Decarbonising the private transport sector also represents a significant development challenge for the EMR. EV and Hybrid vehicles only accounted for 22% of all new private cars licensed for the first time in the Region in 2020, albeit this was above the State average (19.7%). In terms of publicly owned EV charging infrastructure, there was 40 publicly owned ESB EV "Fast Chargers" and only 3 publicly owned ESB EV "High Powered Chargers" in the EMR, as of December 2020[27].

• **Green Infrastructure** A major development challenge facing the Region – along with all regions globally – will be to protect and enhance green infrastructure assets, with the *Country Report* highlighting the importance of ensuring economic growth is broad-based but also environmentally sustainable. Furthermore, environmental sustainability is a significant component of Ireland's Climate Action Plan, the NPF and the RSES, with the EMRA placing "Climate Action" as a one of its three key principles. Central to environmental sustainability is the enhancement and protection of green infrastructure, with such assets acting as one of the most economically viable and effective tools in combating the impact of climate change and halt biodiversity loss, addressing the Climate and Biodiversity crisis, which was announced by Government in 2019.

• **Regional Competitiveness and SMEs.** A key factor to ensuring sustainable economic development is the degree to which region's enterprise bases can remain competitive and productive, with the *Country Report*, noting that differences in regional competitiveness in Ireland are sizeable and that significant productivity gaps remain between lagging domestic firms and highly productive multinational companies. Enhancing the region's competitiveness would be aligned to various RPOs within the RSESs, Enterprise 2025[28] and the Indecon ERDF Needs Analysis, which advocates for initiatives that support competitiveness by enhancing collaboration between industry – particularly SMEs – and the Higher Education sector.

The EMR was ranked the 89th most competitive Region in the EU, as per the findings of the EU's RCI 2019. In this regard, the Region underperforms relative to its peer regions with respect to labour market efficiency and market size. Like the other NUTS 2 Regions, the EMR enterprise base is also notably reliant on SMEs, with 137,049 or 99.5% of the region's enterprises classified as SMEs.

2.4.6 Regional Economic Impact of COVID-19

The most significant change since the publication of the three RSESs, has been the economic impact of COVID-19, and the subsequent transition to remote working. This section will provide a brief overview of the regional economic impact of COVID-19 – specifically in terms of the disruption caused in each region's labour market. This section will also highlight – on a high level – the potential

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[26] https://www.cso.ie/en/releasesandpublications/br/b-lfstb/labourforcesurveybulletinmainplaceofworkandcommutingtimein2019/

[27] Fast chargers can get an 80 percent charge to most EVs in 30 minutes, while high powered chargers can give a charge of 100km in as little as six minutes. Data provided by the ESB

[28] https://dbei.gov.ie/en/Publications/Publication-files/Enterprise-2025-Renewed.pdf

economic and environmental benefits that could be accrued from remote working, as documented in the Regional Co-Working Analysis Report[29] prepared by the three Regional Assemblies.

In 2020, the number of residents from the EMR that were in receipt of the PUP – as a share of its labour force – averaged at 12.5% in Q1 2020, 23% in Q2 2020, 11.5% in Q3 2020 and 13.1% in Q4 2020. As of the end of March 2021, 229,151 residents of the EMR were in receipt of the PUP which would account for 18.4% of the region's labour force. This was above the corresponding State average of 18.1%. This impact varied on a NUTS 3 Regional level, with 19.2% of Dublin's labour market in receipt of the PUP as of the end of March 2021, with the corresponding proportions for the Mid-East and the Midlands amounting to 18 and 15.6% respectively. Separate to the PUP scheme, the total number of employees that received the EWSS and working for an employer based in the Region amounted to 192,857 as of February 2021.

It was estimated that 253,600 private sector workers living in the EMR could operate remotely as of Q2 2020, as per the findings of the Regional Co-Working Analysis. The potential number of private sector workers capable of operating remotely was notably high in local authorities based in the Eastern and Midland Region, with the highest number of private sector workers capable of operating remotely likely to be in Dublin City (84,702), Dún Laoghaire-Rathdown (39,982), Fingal (34,178), and South Dublin (27,614). Other local authorities based in the EMR that are likely to have a high number of private sector workers capable of operating remotely included Kildare (18,475), Meath (14,659) and Wicklow (12,887).

As per the findings of the Regional Co-Working Analysis, a total of 158 co-working hubs – both privately and publicly owned – were identified in the Eastern and Midland Region, as of September 2020. **EMRA's policies in relation to the development of a network of co-working/enterprise and innovation hubs of scale across the Region are further elaborated in Section 3.1.2.**

2.4.7 Midland's Economic Briefing Paper

The EMRA have almost finalised a Midland's Economic Briefing Paper as part of the implementation of the RSES. The aim of the Paper is to provide specific recommendations for stakeholders as to how the economic oriented RPOs of the RSES can be practically implemented in the Midlands. In this regard, the EMRA has adopted a "Smart Specialisation" approach, which is a key economic principal of the RSES and advocated at a European level, with the recommendations of this paper based on up-to-date data, research and input from over twenty different stakeholders based in the Midlands.

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[29] https://emra.ie/dubh/wp-content/uploads/2020/10/Regional-Co-Working-Analysis-16112020.pdf

3.   Cross cutting Issues

EMRA note the five cross-cutting aspects of enterprise innovation as identified in the Consultation Paper and would welcome further clarification as to the basis on which these themes were identified. The Assembly further highlights the need for **alignment with the regional strengths, opportunities, needs and challenges in the RES and ERFF** that are set out in the preceding Section 2**,** and to ensure that **key issues are linked to monitoring and review** so that Ireland's S3 is able to be responsive and adoptive to changing economic conditions.

This section responds to the consultation questions in the S3 Consultation Paper and highlights key spatial and economic policies of the RSES, that are relevant in this regard, **and should be read in conjunction with the text and analysis included in the previous sections.**

3.1   Digitalisation and digital transformation

The Assembly highlights the increasing importance of high-quality communications and addressing regional broadband weakness and digital skills deficits, in order to attract high-value and knowledge intensive employment to the Regions.

The last 18 months have shown that accelerated change towards digital and remote working in response to the COVID-19 pandemic. The availability of broadband is crucial to enable remote working, e-learning and necessary digital infrastructure for business, research and innovation. It is also essential to ensure social inclusion and engagement with marginalised and vulnerable societal groups.

Ongoing and tailored investment is required to deliver a digital just transition for the Region, to ensure readiness for impacted businesses, and to understand and address employment vulnerability resulting from digitalisation. This follows on from work carried out by the National Economic and Social Council (NESC) that identifies Edgeworthstown, Co. Longford as the settlement within Ireland that contains the highest share of employment at high risk of automation at 57.8 per cent.

The roll-out of rural broadband and rapid shift towards remote working opens new opportunities for rural regeneration and diversification of local economies supported by targeted investment in serviced sites and improved connectivity to drive enterprise development. The development of urban centres of scale continues to be crucial in addressing regional imbalances, and remote working has the potential to enhance the growth prospects of our Metropolitan Areas, Designated Regional Growth Centres and Key Towns, as defined by the RSES Spatial Strategy. The Assembly has undertaken research to inform policy in the area of remote working with key priorities elaborated in the following section.

 See also Section 2.4.4. Economic Challenges - Digital Infrastructure and Skills

3.1.2 Develop a network of co-working/remote working, innovation and enterprise hubs

The Regional Assembly supports enhanced investment to develop a network of high-quality co-working hubs of scale within or in close proximity to the designated centres and prominent rural communities.

The three Regional Assemblies carried out a 'Regional Co-working Analysis'[30] to assess the potential impacts and opportunities of a shift towards co-working and remote-working, and potential decrease in the number of commuting trips to large urban centres in the Region. The Report found 387,000 private sector workers (just over one in four) are capable of operating remotely in Ireland, as of Q2 2020, with 253,600 or 65.5% of these were located in the Eastern and Midland Region.

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[30] https://emra.ie/dubh/wp-content/uploads/2020/10/Regional-Co-Working-Analysis-16112020.pdf

Q2 2020 results are also provided for each local authority in Ireland, finding the highest estimated number of private sectors jobs capable of operating remotely in Dublin city council (84,702) and the lowest (1,322) in Longford County Council.

The Regional Co-Working Analysis report also identifies the name, location and type of co-working hubs in each county in Ireland, as of September 2020 – both privately and publicly owned – including 'enterprise and co-working hubs', 'community hubs', and 'higher education and knowledge intensive hubs'. The analysis identified a total of 158 co-working hubs in the Eastern and Midlands Region, 105 hubs in the Southern Region and 67 hubs in the Northern and Western Region and provides a series of considerations to assist policymakers in developing additional coworking hubs across Ireland.

The RSES advocates for a network of innovative co-working spaces in the Region to mitigate long commuting times, promote remote working opportunities and lifestyle benefits. By supporting remote working, policymakers could help provide a wider range of options for workers and businesses allowing some workers to live and work in geographical areas of their own choice, reducing business costs, access to a greater pool of talent, reducing traffic congestion, enhancing the quality of life and reducing the level of greenhouse gas emissions from car usage.

EMRA supports enhanced investment to develop a network of high-quality enterprise / co-working hubs of scale to ensure pipeline of high potential start-ups and scale ups within or in close proximity to the designated centres and prominent rural communities. EMRA also welcomes the development of a network of Digital Innovation Hubs across the Irish Regions as part of the Digital Europe Programme which will be operational by early 2022.

3.1.3 Smart Regions, Cities and Towns

A key focus of the new Cohesion programme (2021-27) is 'A Smarter Europe' with a strong emphasis on innovative, digitalisation & smart economic transformation building on place-based strengths & potentials.

The work of the Southern Regional Assembly in collaboration with the All-Ireland Smart Cities Network based in Maynooth University in developing a Smart Region definition and framework will enable the development of smart regional, cities and towns and will provide vertical support for the parallel 'Regional S3 Framework' Smart Regions have the capacity to transform societies in priority areas such as energy transition, digital growth, circular economy or industrial modernisation and will serve as a key enabler in the Regional S3 approach.

The RSES identifies the need to prioritise the systematic integration of ICT in the planning, design, operations and management of our cities, towns, and villages. This requires the roll-out of Smart Grids and Smart City initiatives that promote collaboration between public, private and research sectors to develop new technology and data driven solutions to urban challenges.

Specifically, this includes the enhancement of; Smart Dublin, which aims to promote the Dublin region as a world leader in the development of smart city technologies, using open data, and with innovation districts such as Smart Docklands as a testbed, and the further development of smart city programmes in the Regional Growth Centres such as Athlone, Drogheda and Dundalk, and of Smart Communities elsewhere, building on the potential offered by improved rural connectivity and digitisation, to build on local enterprise and infrastructure assets to drive innovations around energy, transport, agri-food, tourism, e-services and remote working for instance.

3.2   Green Transformation for Enterprise

The RSES prioritises investment and reform to enhance climate resilience and to develop **economic opportunities relating to low carbon/circular economy and the digital transition**, and to **align new**

policy with EU Green Deal and upcoming National Recovery and Resilience Plan funding to support the creation of sustainable green jobs, sustainable food production and enhanced energy security.

In tandem with the development of a regional approach to Irelands S3 'smart specialisation' is the need to drive the transition to zero carbon by 2050, with an interim target of halving emissions over the next decade, prioritising growth in these sectors and to add value (including increasing the number of high-quality jobs) to any existing related clusters in the Region.

The RSES and MASP sets out policies to promote sustainable patterns of development, including compact growth, sustainable transport and regeneration of brownfield and underutilised lands, including older industrial estates, and provision of Green Infrastructure. Investment is required to ensure that new projects are assessed for their climate impact, including that they are planned, designed, built, and operated in a way that anticipates and adapts to climate change. The ESPON QGasSP Project (Quantitative Greenhouse Gas Impact Assessment for Spatial Planning Policy) is developing a method for quantifying and forecasting the relative GHG impacts of alternative spatial planning policies.

A key priority is the need to invest in an energy-efficient and climate resilient built environment, which includes flood relief, water/wastewater infrastructure, low energy buildings and retrofitting of current housing stock, development of Decarbonisation Zones, district heating opportunities, renewable energy sources (including bioeconomy and offshore wind), and to strengthen energy grid and telecoms networks to facilitate planned green growth, transmission of renewables and development of smart cities and regions. Investment should also acknowledge the ambition of settlements to realise low carbon goals, including, for instance, Portlaoise as a Low Carbon Town.

See Section 2.4.4. Economic Challenges-Just Transition, Energy Efficiency and Sustainable Mobility

3.2.1. Ensuring a Targeted 'Just' Transition

EMRA plays a role in the development and allocation of both the national Just Transition Fund (JTF) and the EU JTF through participation on the steering group overseeing the territorial Just Transition Plan and, on the Midlands, Regional Transition Team (MRTT**),** which brings together Local Authorities and key regional stakeholders including IDA, Enterprise Ireland, Educational Training Boards (ETBs) and Regional Skills Fora.

One of the key principles of the RSES is to ensure effective regional development across the Eastern and Midland Region. This includes enhancing cohesion, taking into account local, regional and national disparities, including rural and urban gaps. It is essential that investment and reform priorities reflect the RSES spatial strategy and settlement hierarchy to allow managed and sustainable growth that enables each place to fulfil ambition and potential, thus mitigating territorial disparities.

The RSES highlights the need for tailored investment to deliver a just transition for the wider Midlands area of the EMR following the cessation of peat cutting and closure of the ESB's Shannonbridge and Lanesboro Power Stations. Furthermore, investment to manage economic structural change in sectors, including agriculture, is required. The investment will be required to manage the impact of Brexit and, in particular, the impact this will have on the agriculture sector within the Midlands.

The RSES identifies the need to support rural towns and communities improving connectivity, providing serviced sites in rural towns and villages and supporting job creation. Traditional sectors such as agriculture, tourism, extractive industries and forestry are complemented by diversification in sectors such as food, renewable energy and opportunities provided from improved digital connectivity and a green transition. The RSES also prioritises the delivery of a network of strategically connected National and Regional Greenways, including the Dublin-Galway Greenway and a connected network of greenways, blueways and peatways. This serves a wide variety of biodiversity and recreation functions as well as significant potential for tourism and diversification of rural and local economies.

3. 3   Innovation Diffusion

The RSES Economic Strategy is underpinned by the need for investment in skills and innovation. The Region is home to a wide range of organisations engaged in innovation, such as higher education institutes (HEIs) and research centres, most of which are located in the Dublin Metropolitan Area, Athlone and Dundalk. This is a key strength of the Region that can be capitalised upon.

A key priority is to foster collaboration between industry and research to identify priority areas and projects for funding. The enterprise ecosystem also comprises business incubation centres, community enterprise centres, accelerator development schemes, local enterprise offices, research and innovation centres with Higher Education Institutes (HEIs), technology gateways, technology centres, research centres, and IDA business and technology parks. RSES policies also promote investment in a functional property and infrastructural ecosystem to ensure ready to go, sufficiently scaled landbanks with appropriate utility infrastructure.

The RSES recognises the role of these assets in creating Technology Innovation Poles to enable and stimulate collaboration within and across regions, building on the expertise and supportive capabilities of the Institutes of Technologies (ITs), Technical Universities (TUs)and Universities (DCU, UCD, Trinity and NUI Maynooth) and working with Enterprise Ireland (EI), IDA Ireland and Regional Skills Fora to drive RDI investment and support the development of sites for high-tech and high potential start-ups.

The Local Enterprise Offices (LEOs) network provide a one-stop shop for small enterprises and act as catalysers and accelerators of entrepreneurship by means of training and providing networking opportunities and developing the social enterprise sector.

Further information on R&I assets is set out in section 2.31 and Appendix E -Enterprise Development and Innovation Assets

3.3.1 Skills development

Skills development will be key to ensuring equal access to opportunity. The RSES supports the work of the Regional Enterprise Plans (REPs), LEOs and local authorities to collaborate with the Regional Skills Fora, HEIs, Education Training Boards (ETBs) and local stakeholders to address skills shortages ad lifelong learning challenges in the Regions.

There will be a need to prioritise investment and reforms for locations where local economies may be impacted by changing technologies, to bridge the 'digital divide' and develop new skills and retraining opportunities to enable workers to adapt to new ways of working including a rapid shift towards flexible and remote working in response to COVID-19, as well as the green and digital transitions.

The EMRA, through the RSES, support the provision of high-quality childcare, education and training provision, to provide for greater educational choice to improve skills and assist in tackling disadvantage, including support for Athlone IT to achieve TU status, thus supporting Athlone's role as a Regional Growth Centre serving the wider Midland catchment.

3.4   International collaboration on RD&I

EMRA with its role in coordinating and managing European funds, and the Irish Regions Office in Brussels will collaborate with Government Departments to develop international relationships and strengthen the Region's economic diplomacy.

In the context of Brexit and disruptions to supply chains it is timely to accelerate activities by Irelands' enterprise agencies to create and strengthen linkages between Irish-owned and foreign enterprises and strengthen the capacity of Irish owned enterprises to meet the demand for innovative products and services and develop their capacity to compete internationally.

Although trade agreements are managed at EU level, measures can be put in place to build international relationships with branding and reputation, building on the culture, heritage and attractiveness of the Region, to gain a greater share in international markets and develop new markets for the Region's enterprise base.

The RSES also supports the LEOs and enterprise development agencies in their efforts to increase business innovation capacity, to create a distributed network of co-working hubs, to promote Ireland's edge to strengthen linkages between Irish owned enterprises and foreign owned enterprises, and to support existing Irish entrepreneurs and to attract overseas entrepreneurs.

See also Section 2.4.4. Economic Challenges –Competitiveness and Exporting, and Regional Competitiveness and SMEs

3.4.1 Challenge centric approaches to drive collaboration.

The development of a regional approach to S3 offers an opportunity not just to build on identified strengths as part of strategic approach to clustering but also to diversity the economic base and address key societal challenges. Continued investment is needed as part of a Regional Smart Specialisation Strategy in challenge-based approaches.

The RSES recognises the role of the Project Ireland Disruptive Technologies fund (DTIF) in driving collaboration and commercialisation of research to position Ireland as a global innovation leader in the identified research priority areas of ICT; Health and Wellbeing; Food; Energy Climate and Sustainability; Manufacturing and Materials; and Services and Business Processes.

The RSES also recognises the challenge-based approach undertaken by Smart Dublin as part of the national innovation pre-commercial procurement initiative administered by Enterprise Ireland SBIR (Small Business Innovation Research) programme, which provides an opportunities for local authorities to engage with smart technology providers and start-ups to develop new solutions to identified urban challenges through a programme of competitive open calls. Further investment is needed in order to further leverage the research and technological capabilities of research institutes, HEIs and our Irish and foreign owned enterprises, and to explore a broader focus for the identified challenge areas in DTIF, potentially linked to the Strategic Outcomes in the NPF/RSES.

See also Section 2.4.4. Economic Challenges facing the Region

3.5 Actions to improve the national or regional enterprise R & I system

It is a priority of the RSES to create a business environment that is conducive to business start-up, including SMEs, and sustaining growth throughout all phases of their lifecycle. EMRA will aid and support enterprise development agencies in the removal of obstacles to starting and scaling a business and with key stakeholders to create an enterprise ecosystem that stimulates a pipeline for growth.

Through the identification of locations for strategic employment development in line with RSES Growth and Settlement Strategy, the delivery of housing and sustainable urban development in tandem with enabling infrastructure will be delivered in the Region, along with the critical mass (and diversity) in population and enterprise base to attract and maintain employees and employers.

The RSES sets out Guiding Principles for the location of strategic employment and investment prioritisation that include access to; suitable locations (depending on the extent to which and enterprise is people or space intensive); serviced sites (based on whether an industry is dependent on a particular infrastructure such as energy, water, transport or communications networks); connectivity (including access to international markets that require proximity to airport/port); skilled labour force (proximity to third level and lifelong learning) and; local strengths (a diverse sectoral mix,

research, innovation and technology centres, start-up hubs and incubators, emerging clusters or cross industry value chains).

Local authorities in their city and county development plans and through Local Economic and Community Plans (LECPs) should apply the same principles, thus driving policy alignment and greater consistency of local economic development policy.

See also Section 2.4.4. Economic Challenges – Research & Innovation Capacity,

3.5.1 Creating Regional Effectiveness and Balance- Addressing Regional Disparities

The Regional Assembly not only acknowledges regional disparities at a national level but also those disparities that exist within the Eastern and Midland Region. Examples of this include the Assembly's "COVID-19 Regional Economic Analysis" report[31], which the three Regional Assemblies of Ireland prepared to identify the geographical areas in Ireland which are more likely to be exposed to the economic disruption caused by the necessary measures to prevent the spread of COVID-19.

The EMR has an exposure rate of 43.6%. At a sub-regional level, the Midlands was one of the areas worst exposed to the economic disruption caused by COVID-19 at 48.9%, and in absolute terms, that the Dublin region has the highest number of units operating in the worst affected sectors. The sectors considered to be the worst affected include construction, wholesale and retail (excluding essential services), accommodation and food services, arts, entertainment and recreation services, childcare, quarrying and mining, and hair, beauty and wellbeing services.

In addition, ESRI research has shown that "First Time Buyer" households in Dublin, Wicklow, Meath, and Kildare would have to pay between 31% and 36% of their monthly income on their mortgage instalments[32] in 2018, which would be above the standard affordability benchmark of 30%. A priority is therefore to ensure regional effectiveness and balance through the implementation of a regional approach to Smart Specialisation Strategy.

EMRA are currently developing a Regional Development Monitor with key indicators for monitoring delivery of RSES and MASP, and to create an evidence base which may also be helpful in the preparation and implementation of Smart Specialisation Strategy– See Appendix A.

See also Section 2.4.4. Economic Challenges – Urban Centres of Scale and Skills Development

3.5.2 Healthy Placemaking to revitalise urban centres and build economic resilience to support COVID recovery.

Support for placemaking is embedded in the Economic Strategy of the RSES and linked to enterprise growth and the ability to attract and retain talent and investment. This is complemented by developing critical mass in key locations set out in the RSES and MASP with access to housing choice, employment opportunities and lifelong education.

Healthy Placemaking prioritises improvements to both physical and social infrastructure including public realm, sustainable transport, recreation and open space, green infrastructure, heritage led regeneration, and community facilitates to create sustainable communities, in line with the '10 minute settlement' concept whereby a range of local services are accessible within walking distance or by high quality public transport.

Targeted investment will be needed to support affected sectors, to upskill/reskill and to diversify local economies to build resilience to COVID, Brexit, global trends and external shocks. Investment in

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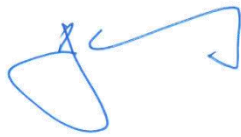
[31] https://emra.ie/dubh/wp-content/uploads/2020/05/CV19-Regional-Economic-Analysis.pdf
[32] https://www.esri.ie/system/files/publications/RN20190402_0.pdf

infrastructure and services should be aligned to support regeneration of strategic opportunity sites identified in the MASP and the RSES and deliver revitalised mixed-use centres. Public realm and active travel interventions in response to COVID should also incorporate monitoring measures to inform the implementation of permanent solutions where clear benefits are identified and support the delivery of strategic policy objectives such as compact growth, urban regeneration, sustainable mobility and strengthened local economies and communities.

3.0 Conclusion

In conclusion, the Regional Assembly welcomes the opportunity to engage in the consultation process and look forward to any further engagement from the Department in this regard in order to mitigate the economic and social impact of the pandemic, address regional and subregional disparities and create economies and societies which are more sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions, and to ensure a consistent approach to regional innovation and smart specialisation.

Regards,

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Jim Conway,
Director
Eastern and Midland Regional Assembly
17th August, 2021

Appendix A: Regional Economic Context for S3 – Evidence Base

The following content sets out key indicators for the Eastern and Midland Region, which has been used to inform the economic profile and priorities outlined within this submission.

Placemaking Profile

1. **Population Estimates:** The total population of the Eastern and Midland Region (EMR) stood at 2.5 million as of April 2020, accounting for just under half of Ireland's population (49.3%)[33]. By 2040, it is estimated that the Region's population will rise to around 2.85 million[34].

2. **Commuting Patterns:** As of Q2 2019[35], residents living in the EMR experienced notably long commute times, compared to the national average of 28 minutes for a one-way commute. Of the eight sub-regions, residents in the Mid-East had the longest one-way commute time in Ireland – at 34 minutes – with residents in Dublin (31 minutes) and the Midlands (29 minutes) recording the 2nd and 3rd longest average one-way commute times in the State.

3. **Housing Affordability:** ESRI research has shown that "First Time Buyer" households in Dublin, Wicklow, Meath, and Kildare would have to pay between 31% and 36% of their monthly income on their mortgage instalments[36] in 2018, which is above the affordability benchmark of 30%.

4. **Deprivation Rates:** As of 2019, 17.7% of the EMR's population are experiencing enforced deprivation, which was marginally below the corresponding national rate of 17.8%[37].

5. **Education Attainment:** Third level attainment rates in the EMR stood at 51% in 2019, which was above the corresponding State average of 47%. Encouragingly, third level education enrolments[38] in the Region have risen from just over 93,987 in 2009 to just over 121,083 in 2019.

6. **Public Transport Accessibility:** As of 2016[39]", 68.3% of Dublin's population was served with high frequency public transport, (i.e. Luas, bus or train with over 50 departures a day), well above the corresponding State average of 29.6% of the population. All four local authorities in Dublin recorded ratios above the State average. Outside of Meath – where 33.7% of the population where served by high frequency public transport stops – the remaining counties in the EMR registered below average proportions namely, Louth at 10.3%, Offaly at 11.7%, Wicklow at 11.9%, Westmeath at 17.1%, Kildare at 21.3% and Laois at 27.2%.

7. **Household Energy Efficiency:** As per the latest figures[40], 19 per cent of the homes audited in Ireland registered either a BER of "A" or "B" between 2009 and Q3 2020, with below average proportions recorded in Offaly (11% of homes to register either a BER of "A" or "B"), Longford (12%), Westmeath (13%) and Laois (16%). Only 31 per cent of the homes audited in Dublin County registered either a BER of "A" or "B" between 2009 and Q3 2020, with lower ratios recorded in Meath (28%), Kildare (25%), Louth (22%), Wicklow (22%) and Dublin 01-24 (20%).

8. **EV / Hybrids Sales:** As of 2019, EV and Hybrid cars accounted for 18 % of all new cars licensed for the first time in Longford, which was above the national ratio of 12.7% and the highest out of all

[33] https://www.cso.ie/en/releasesandpublications/er/pme/populationandmigrationestimatesapril2020/

[34] https://www.esri.ie/system/files/publications/RS111.pdf https://npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf

[35] https://www.cso.ie/en/releasesandpublications/br/b-lfstb/labourforcesurveybulletinmainplaceofworkandcommutingtimein2019/

[36] https://www.esri.ie/system/files/publications/RN20190402_0.pdf

[37] https://www.cso.ie/en/releasesandpublications/ep/p-silc/surveyonincomeandlivingconditionssilc2019/

[38] Higher Education Authority enrolment data. Includes enrollments from undergraduates, postgraduates, FETAC Advanced Certificate, FETAC Certificate, and remote learners

[39] https://www.cso.ie/en/csolatestnews/presspages/2019/measuringdistancetoeverydayservicesinireland2019/

[40] https://www.cso.ie/en/releasesandpublications/er/dber/domesticbuildingenergyratingsquarter32020/

the counties in Ireland. This was followed by Westmeath at 15.9%, Meath at 15.3%, Wicklow at 15.3%, Kildare at 14.3%, Offaly at 14.2%, Dublin at 13.6%, Louth at 13% and Laois at 10.8%[41].

9. **EV Public Charging Infrastructure:** As of Dec 2020, there was 40 ESB EV "Fast Chargers" in the EMR, with each of these chargers having three sockets of different varieties, while there was 3 ESB EV "High Powered Chargers" based in the region, with this charger having two sockets of different varieties[42].

Economic Profile

10. **GDP:** The Eastern and Midland Region's economy was valued at €175 billion as of 2018, accounting for just over half (54%) of the economic output generated by the Irish economy[43].

11. **Labour Market Conditions**: As of Q3 2020, total employment in the EMR amounted to 1.17 million, which accounted for 50.8% of Ireland's employment base. By 2040, it is estimated that the Region's employment base will expand to around 1.34 million[44]. A total of 182,413 residents in the EMR were in receipt of the Pandemic Unemployment Payment (PUP) as of Nov 2020[45]. The total number of employees in receipt of the Employment Wage Subsidy Scheme and working for an employer based in the EMR amounted to 163,585[46], as of the end of November.

12. **Enterprise Base:** As of 2018, there was 269,687 SMEs operating in Ireland; 265,890 of which were registered in a specific county in Ireland[47]. Of this total, 137,049 SMEs were in the Eastern and Midland Region, highlighting the Region's importance to Ireland's SMEs market. In absolute terms, Dublin had the highest number of SMEs in Ireland, at 87,773 in 2018.

13. **Multinational Companies**: As of 2019, a total of 1,549 companies were supported by the IDA Ireland, with the majority (62.3%) located in the Eastern and Midland Region[48]. As of 2019, IDA Ireland supported companies employed a total of 245,096 jobs in the State, with just over half or 130,538 located in the Eastern and Midland Region.

14. **Brexit Exposure:** The sub-sectors of the economy that are likely to be either severely or moderately affected in the event of a "Hard Brexit"[49] accounted for 36.4% of the EMRs employment base in Q3 2020, which in absolute terms amounted to 423,700 jobs.

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[41] Regional Assemblies of Ireland calculations using CSO data: https://data.cso.ie/
[42] Fast chargers can get an 80 percent charge to most EVs in 30 minutes, while high powered chargers can give a charge of 100km in as little as six minutes. Data provided by the ESB
[43] https://www.cso.ie/en/releasesandpublications/er/cirgdp/countyincomesandregionalgdp2017/
[44] https://npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf
[45] https://data.cso.ie/product/LR
[46] https://revenue.ie/en/corporate/documents/statistics/registrations/covid-19-support-schemes-statistics-12-november-2020.pdf
[47] https://www.cso.ie/en/releasesandpublications/er/bd/businessdemography2018/
[48] Data obtained from the IDA
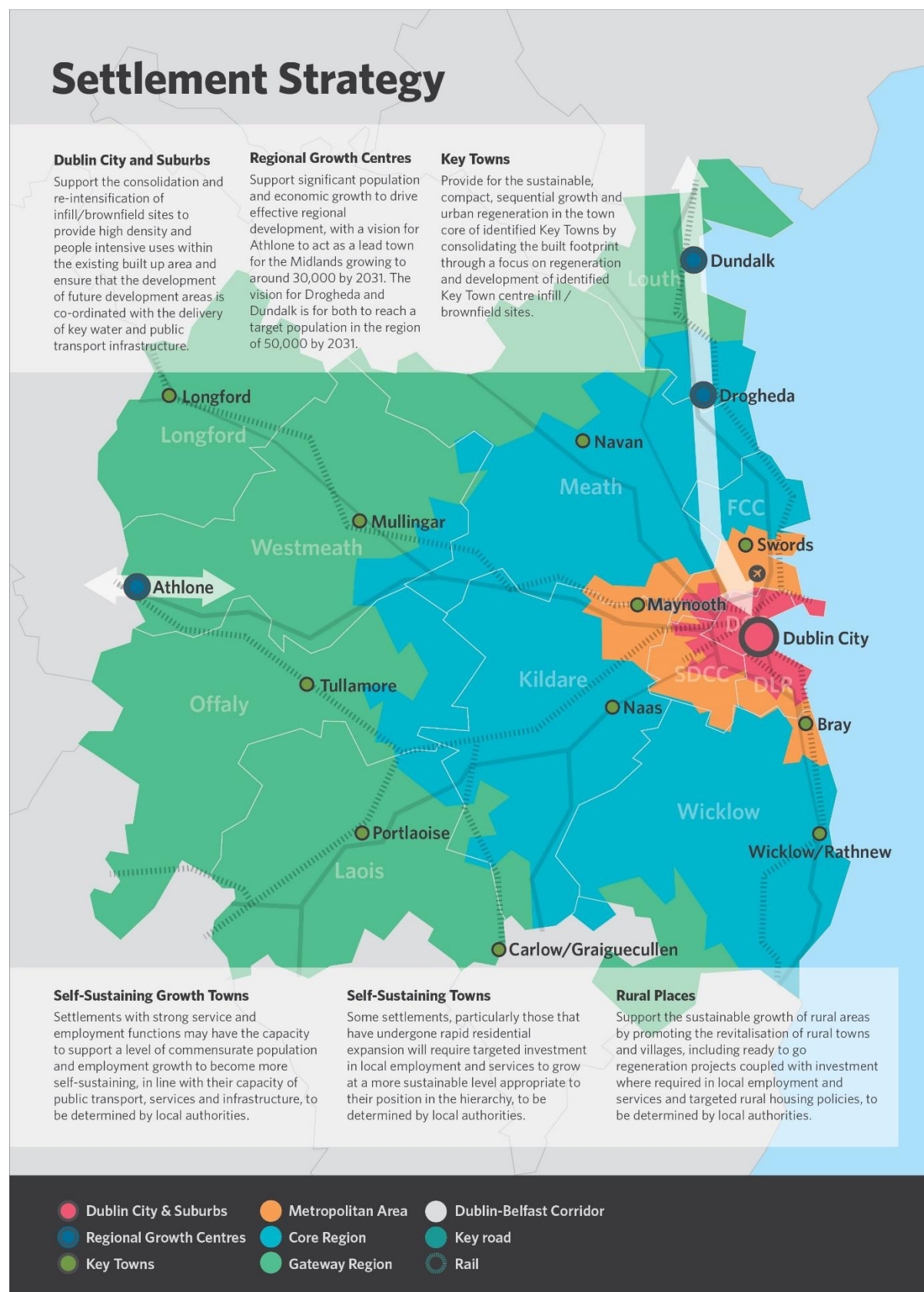[49] Sub-sectors of the economy that are likely to be severely affected in the event of a "Hard Brexit" is based on research by the ESRI, which rank exposure based on a region's reliance on certain employment activities under certain 2 digit NACE codes: https://www.esri.ie/system/files/publications/WP677_0.pdf

Appendix B: RSES Economic Strategy for the Eastern and Midland Region (EMR)

Appendix C: RSES Settlement Strategy of the EMR

Settlement Strategy

Dublin City and Suburbs

Support the consolidation and re-intensification of infill/brownfield sites to provide high density and people intensive uses within the existing built up area and ensure that the development of future development areas is co-ordinated with the delivery of key water and public transport infrastructure.

Regional Growth Centres

Support significant population and economic growth to drive effective regional development, with a vision for Athlone to act as a lead town for the Midlands growing to around 30,000 by 2031. The vision for Drogheda and Dundalk is for both to reach a target population in the region of 50,000 by 2031.

Key Towns

Provide for the sustainable, compact, sequential growth and urban regeneration in the town core of identified Key Towns by consolidating the built footprint through a focus on regeneration and development of identified Key Town centre infill / brownfield sites.

Self-Sustaining Growth Towns

Settlements with strong service and employment functions may have the capacity to support a level of commensurate population and employment growth to become more self-sustaining, in line with their capacity of public transport, services and infrastructure, to be determined by local authorities.

Self-Sustaining Towns

Some settlements, particularly those that have undergone rapid residential expansion will require targeted investment in local employment and services to grow at a more sustainable level appropriate to their position in the hierarchy, to be determined by local authorities.

Rural Places

Support the sustainable growth of rural areas by promoting the revitalisation of rural towns and villages, including ready to go regeneration projects coupled with investment where required in local employment and services and targeted rural housing policies, to be determined by local authorities.

Legend:
- Dublin City & Suburbs
- Regional Growth Centres
- Key Towns
- Metropolitan Area
- Core Region
- Gateway Region
- Dublin-Belfast Corridor
- Key road
- Rail

Appendix D: Economic Engines and their Sectoral Opportunities

Sectoral Opportunities Dublin and Eastern SPAs

Having regard to the strengths of its own enterprise base, Dublin should explore opportunities for further development on Fintech, CorpTech, personalised and regenerative medicine, internet of things, artificial intelligence, cybersecurity, technology consulting, sharing economy, international education services, investment management and administration, and marine energy. The Dublin Regional Enterprise strategy (2017-2019) identifies key sectors and employment levels, together with the clustering of activity and supports across the Region, including: administration; professional services; tourism and leisure; education and training; manufacturing and industry; transport and logistics; construction; information and communication technology, and, retail and wholesale. Current REPs and LECPs identify manufacturing, distribution and logistics, technology, pharmaceutical, equine foods, and creative industries/film.

Sectoral Opportunities Dublin-Belfast Economic Corridor (including Dundalk and Drogheda)

Advanced manufacturing, smart manufacturing, biopharma, bioprocessing, applied nanotechnology, alcoholic beverages, marine energy, energy storage, wind energy, advance manufacturing, experiential tourism, and Fintech.

Sectoral Opportunities Midlands (including Athlone)

Advanced manufacturing, smart manufacturing, medical devices, implanted devices, pharma/bio, food and engineered products, advanced composite materials, applied nanotechnology, technology consulting, Food and Beverage Industry including sustainable foods, meat products, agri-biologicals, bio-refining, bio-conversion, biotechnology, smart construction, Tourism including experiential tourism, precision farming, global engineering services outsourcing, drug delivery services, renewable energy, Big Data and Data Analytics.

Sectoral Opportunities Key Towns, Self- Sustaining Growth Towns, Self- Sustaining Towns and Rural Places

Precision farming, biotechnology, Tourism including experiential tourism, food and beverage products, functional food premium, renewable energy, solar energy microgeneration, wind energy, energy storage, and low carbon construction.

Appendix E: Enterprise Development and Innovation Assets

EMRA Enterprise Development and Innovation Assets
Key economic assets across the EMRA region

Map Legend - Enterprise Development and Innovation Assets

- Higher Education Institutes (HEIs)
- EI - Business Incubation Centres
- Business Innovation Centres
- EI - Technology Gateways
- Technology Centres
- IDA - Parks and Sites

- Strategic Planning Area (SPA)
- Local Authority
- Motorway
- Primary Roads
- Rail Network

- Dublin City and suburbs
- Regional Growth Centres
- Key Towns

EMRA Enterprise Development and Innovation Assets Map

Key economic assets across the EMRA region (focus on Dublin SPA)
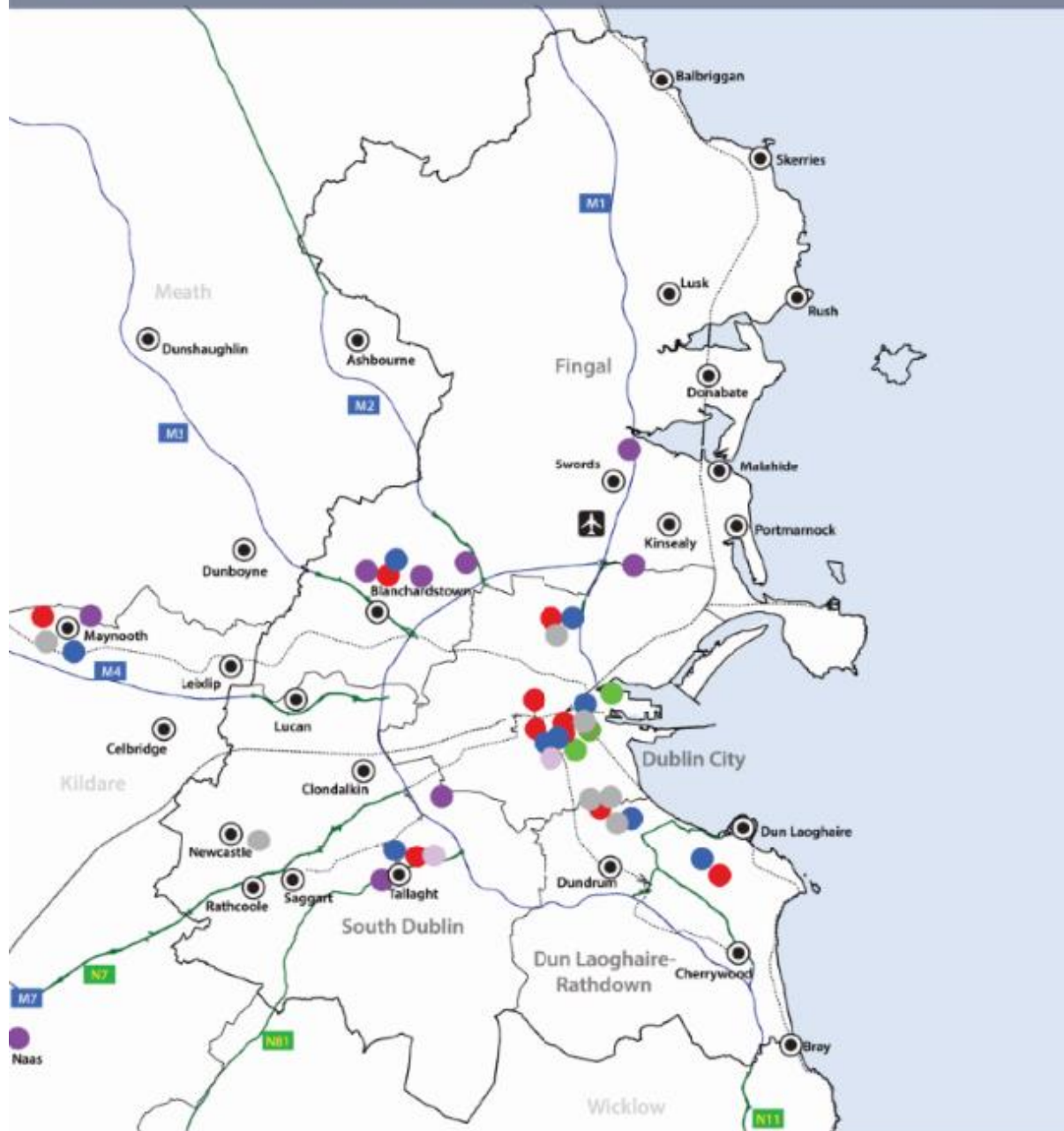
Map Legend

Enterprise Development and Innovation Assets

- 🔴 Higher Education Institutes (HEIs)
- 🔵 EI - Business Incubation Centres
- 🟢 Business Innovation Centres
- 🟣 EI - Technology Gateways
- ⚪ Technology Centres
- 🟣 IDA - Parks and Sites

- ▭ Strategic Planning Area (SPA)
- ▭ Local Authority
- —— Motorway
- —— Primary Roads
- ······ Rail Network
- ◉ Key Towns

AIRO
All Island Research Observatory
An Áireamh-aonad Uile-Éireann

Comhairle Réigiúnach Oirthir agus Lár Tíre
Eastern and Midland Regional Assembly