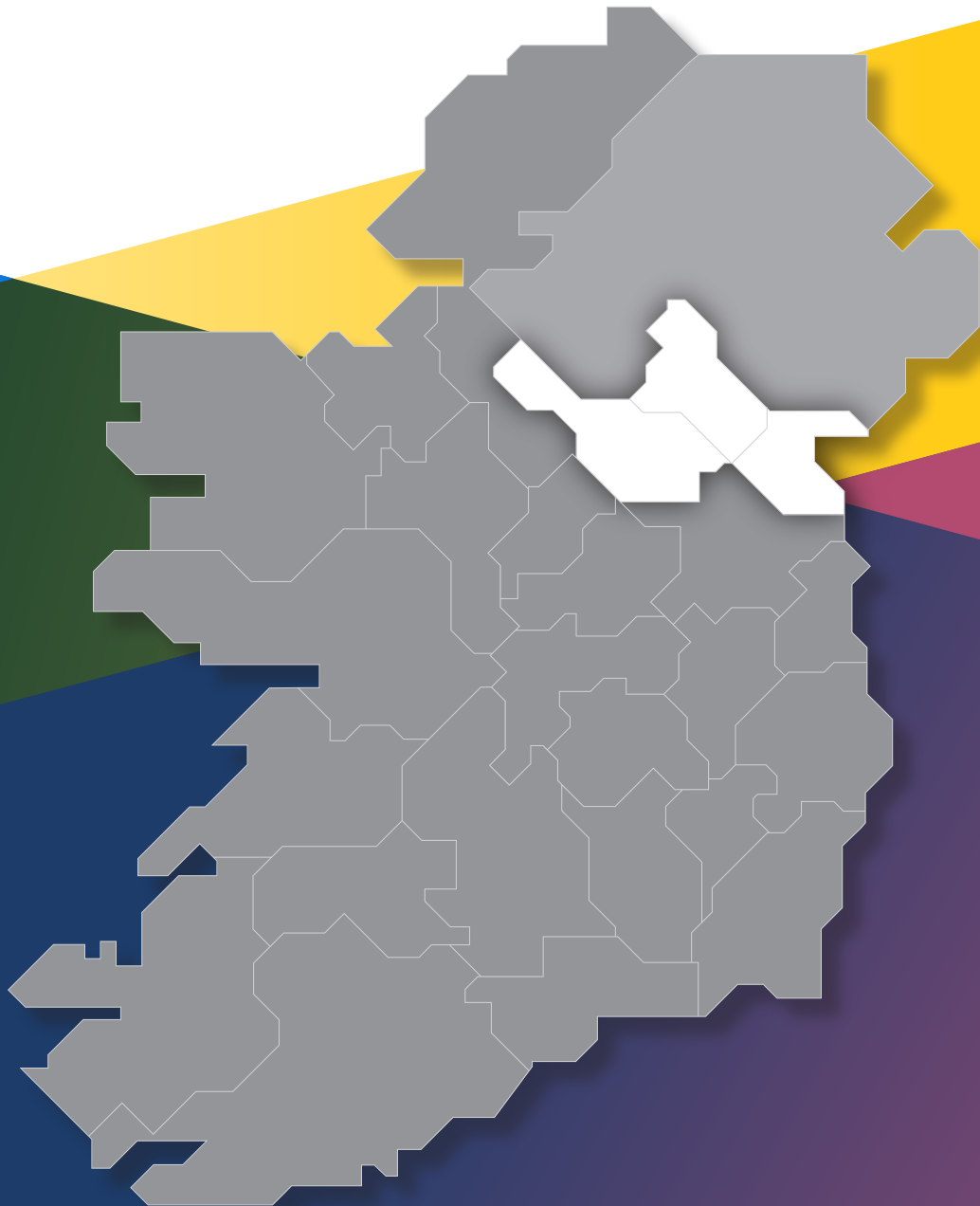




Rialtas na hÉireann
Government of Ireland

Regional Enterprise Plan to 2020

NORTH-EAST



An initiative of the Department of Business, Enterprise and Innovation

Regional Enterprise Plan to 2020

NORTH-EAST

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Minister's Foreword

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

In the North-East/North-West (Border) Region, the 2015-2017 Regional Action Plan for Jobs (RAPJ) set out 153 actions to support job creation and accelerated economic recovery. At the end of that period, more than 8,800 jobs have been created in the region, and with an unemployment rate currently at 5.1 percent in the Border Region much has been achieved.

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

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

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

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

My Department's *Enterprise 2025 Renewed*, has oriented our enterprise policy towards building resilience in our enterprise base so that our businesses and our economy more generally can withstand new challenges and realise sustained growth and employment creation for the longer-term. Together with the Department of the Taoiseach, we are defining a whole of Government *Future Jobs Ireland* agenda that will give effect to that policy focus, with key actions to drive productivity growth and innovation, build enterprise resilience, increase participation in the labour force, and enable businesses to transition to a low carbon economy context. In addition, through *Project Ireland 2040* we will make sustained investments in place-making so that Ireland remains an attractive place to live, work and invest over the longer term.

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

Under my Department's €60 million competitive Regional Enterprise Development Fund (REDF) the North-East has already secured more than €5.4 million across three projects that will enhance the region's potential for enterprise growth and job creation. Guided by this new Regional Enterprise Plan, the region is well positioned to compete for further competitive calls, including the REDF, on a rolling basis, as part of the further roll-out of *Project Ireland 2040*.

I want to commend the work of the Implementation Committee under the chairmanship of Richard Hanlon, SVP, Vesta Payment Solutions for their work on the roll out of the first RAPJ for the North-East Region. I welcome the new focus and energy embodied in this refreshed Regional Enterprise Plan for the region and recognise the extensive collective reflection and effort that has gone in to its production.

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



A handwritten signature in black ink, which appears to read "Heather Humphreys". The signature is written in a cursive style.

Heather Humphreys TD

*Minister for Business, Enterprise and Innovation
February 2019*

Chair's Introduction

This refreshed North-East Regional Enterprise Plan seeks to build on the progress achieved within the 2015-2017 Regional Action Plan for Jobs (RAPJ) with a renewed mission to facilitate realisation of the region's economic potential, raising both the level and quality of employment across the region.

The 2015-2017 RAPJ set out an ambitious set of actions in support of job creation and economic recovery with substantial progress being accomplished. I would like to thank the Implementation Committee and the various stakeholders for their collaborative efforts, both practical and strategic, in delivering on those ambitions.

In refreshing the Plan towards 2020, it is vitally important that we recognise the future challenges in both creating and sustaining jobs through enterprise development. With unemployment across the region at a much reduced and stable level, our focus remains on job creation but with additional emphasis on employment sustainability and resilience. As a border region, one particular challenge is the economic uncertainty surrounding the UK departure from the European Union. The strategic objectives outlined here in this refreshed Plan look to address such challenges, exploiting the unique strengths and capabilities of the North-East through the continued coordination and collaboration of our enterprise agencies and other bodies.

The Plan's strategic objectives and related key actions have been formulated through a series of stakeholder-led engagements that brought forward the economic developmental themes of talent leverage, workforce development, SME resilience, sectoral clustering and tourism visitor engagement

I'm confident, through this refresh Regional Enterprise Plan, that the continued work of the Steering Committee will successfully build upon what has been achieved to date under the RAPJ. The refresh plan's renewed emphasis on sustainability and resilience will allow us to further realise the region's economic potential and make the North-East region a great place to both work and live.



Richard Hanlon
SVP
Vesta Payment Solutions

*Chair
North-East Regional Enterprise Plan*

1 Policy Context

The North-East Regional Enterprise Plan (REP) is one of nine such Plans that have emerged from a process to refresh and refocus the Regional Action Plan for Jobs (RAPJ) initiative which originally focused on the 2015-2017/8 period. The purpose of the refresh and refocus was to further build on the positive regional collaboration fostered by the RAPJs over the period to 2020, taking account of the changed and improved economic circumstances nationally, the emergence of new challenges to enterprise development and competitiveness both domestically and internationally in origin, including Brexit, and the persistence of uneven economic progress across the regions in Ireland - as of Q3 2018 there were three¹ regions with rates of unemployment more than one percent above the State average of 6 percent.

The REPs provide perspective and ideas from the 'ground-up'. They are informed by an understanding of unique local strengths and assets and have the potential to enable more effective translation of national policy into regional and local impact². They focus on leveraging the added value from regional and local actors working collaboratively, and in so doing, they aim to complement and build on the existing activities being undertaken by the Enterprise Agencies, the LEOs and the wider range of State Bodies directly involved in supporting enterprise development in the regions (see Chapter 3 on Enterprise Agency and LEO activities and Appendix 4). As a result, the Plans are focused on a suite of selected priority objectives requiring a collaborative regional effort and are not meant to be comprehensive economic development strategies on their own. The Regional Steering

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

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

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

- an increased emphasis on developing our Irish owned enterprises – enhancing productivity and delivering quality jobs – and helping companies to navigate Brexit;
- exploiting the potential offered by collaboration and clustering within our distinctive foreign and Irish owned enterprise mix;
- placing a spotlight on innovation (including disruptive technologies) and talent development, so that more enterprises are developing new products, services and solutions, and are more competitive internationally;

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

2 Appendix 2 contains a brief regional profile and statistical snapshot of the North-East

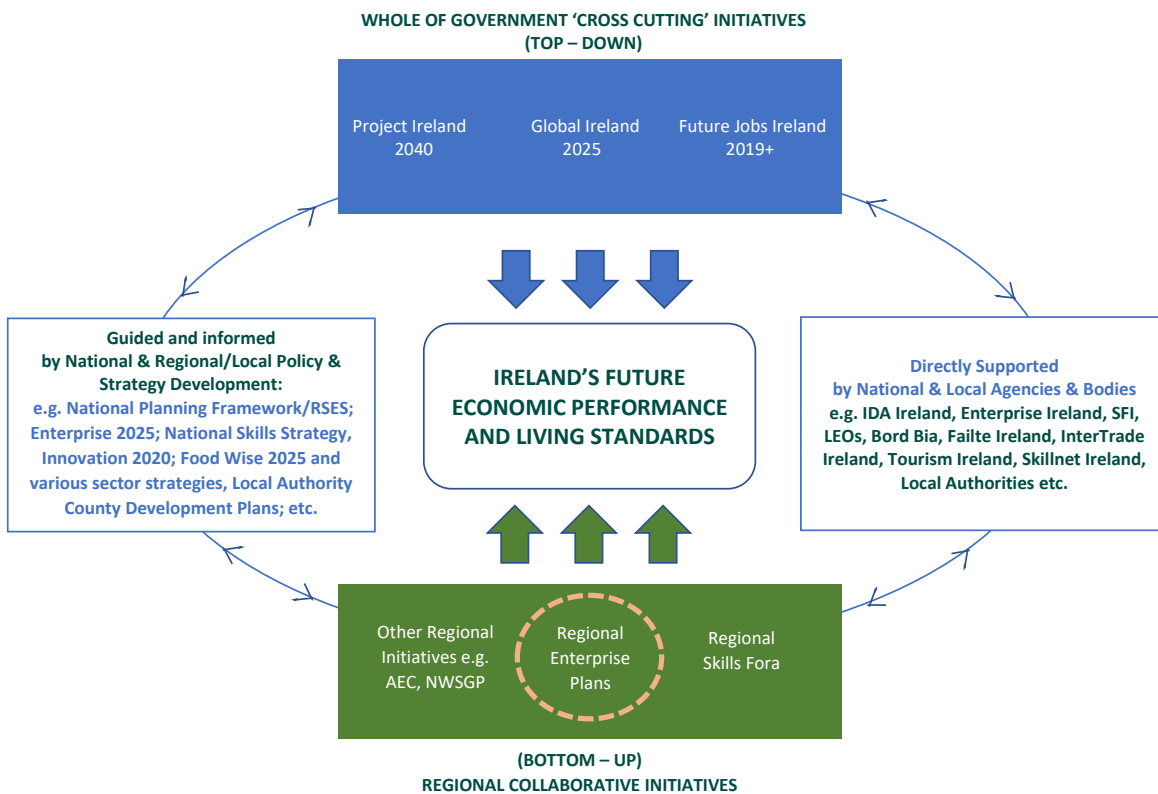
- realising the full potential of our regions – developing places that are attractive for business investment and for people to live and work; and
- raising Ireland’s visibility internationally, protecting Ireland’s reputation, and providing opportunities for our enterprises supported by the Global Footprint 2025 initiative.

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

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

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

Figure 1





2 North-East Regional Enterprise Plan to 2020

Vision Statement for the North-East

Facilitating the realisation of the region's economic potential and raising both the level and quality of employment across the region.

STRATEGIC OBJECTIVES



STRATEGIC OBJECTIVE 1:

Leverage the full extent of talent residing in the North-East to drive new enterprise investment and growth



STRATEGIC OBJECTIVE 2:

Implement a holistic approach to workforce development in the North-East, matching workers' skills to needs in the region's enterprises and further developing the knowledge, skills and competencies of those currently in the workplace



STRATEGIC OBJECTIVE 3:

Strengthen SME resilience in the North-East so as to achieve development and growth in the face of external challenges



STRATEGIC OBJECTIVE 4:

Drive a higher level of economic success in the North-East by building on niche strengths and fostering clustering amongst enterprises



STRATEGIC OBJECTIVE 5:

Strengthen the attractiveness of the North-East as a destination to visit

STRATEGIC OBJECTIVE

1

Leverage the full extent of talent residing in the North-East to drive new enterprise investment and growth

CONTEXT

Project Ireland 2040 and the Region Spatial and Economic Strategy (RSES) for the Eastern and Midlands Region has identified Dundalk and Drogheda as part of a sustainable network of centres of scale, including Newry, connected by public transport within the region and within the Dublin-Belfast Economic Corridor. Indeed Census 2016 revealed that Drogheda is the fastest growing town in terms of population in the country.

However, the North-East is home to a considerable amount of people who leave the region every morning to commute to other locations in the country for work. By moving from anecdotal to definitive statistics of movements, the North-East will be in a stronger position to attract investment to the region.

The current All-Island Research Observatory (AIRO) study indicates that there are 2.25 million people living within a 60-minute commute of Dundalk and Drogheda and that 400,000 people live within 30 minutes of both towns. It also reveals that of the 130,000 people living within 15 minutes of either town, 27,000 are working within that zone and 27,000 commute to workplaces outside the zone. Of the latter 27,000 group, 62 percent have third level qualifications.

By commissioning a definitive study across Louth, Monaghan and Cavan, the region will be able to present clear data on the wealth of talent that exists in the North-East that is available and willing to work within the region, rather than commuting on a daily basis.

VISION TO 2020

To establish a clear picture of the available skills in the North-East and how to retain workers and attract increased investment.

KEY ACTIONS TO 2020

Action 1:

Using the methodology from the Louth County Council/AIRO study on commuting and the Dundalk IT catchment study, extend and expand the study to cover the whole of the North-East region.

This study will provide authoritative and independent analysis about the commuting patterns in the North-East thereby forming a clear picture of the available skills in the region.

Timeframe for delivery: Work started by end of Q2 2019 with study completed and findings published by end of Q2 2020.

How will delivery be measured:

Complete and publish the study

Responsibility: Three Local Authorities, DKIT, IDA Ireland

Action 2:

IDA Ireland and Enterprise Ireland will use the results of the study as part of their marketing and promotional material for both domestic and foreign investment.

Timeframe for delivery: Findings to be used and published in Q2 2020

How will delivery be measured:

Increase in the amount of marketing material available

Responsibility: IDA Ireland, Enterprise Ireland

Action 3:

Strengthen the value proposition of the North-East for new enterprise investment by examining the potential of greenfield/brownfield sites in the region that can be made client ready in order to secure a second-site win.

Timeframe for delivery: End of 2020

How will delivery be measured:

- Assessment of available and potential sites completed

Responsibility: IDA Ireland, Enterprise Ireland, Local Authorities

Action 4:

Consider opportunities to better position and promote the North-East to enhance and highlight the attractiveness of the region to live and work in.

Timeframe for delivery: Q4 2019

How will delivery be measured:

Opportunities identified and action plan in place to deliver

Responsibility: Local Authorities, IDA Ireland, Enterprise Ireland and other relevant regional stakeholders

STRATEGIC OBJECTIVE

2

Implement a holistic approach to workforce development in the North-East, matching workers' skills to needs in the region's enterprises and further developing the knowledge, skills and competencies of those currently in the workplace

CONTEXT

Talent is the key business differentiator and asset for the twenty-first century and the global competition for talent is becoming more apparent. The North-East's ability to continue to grow and attract investment will be dependent on readily available talent and highly skilled workers. The skills supply needs to be appropriately configured so that it can be responsive and adaptable to the needs of enterprise in the North-East. Considerable work is ongoing to address these needs, in particular through the North-East Regional Skills Forum.

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

Today's highly competitive marketplace requires that businesses can be flexible and agile. In a similar way, the direction and success of individual career paths is determined by an ability to develop and maintain relevant skills and expertise, and an ability to overcome disruptions (such as business restructuring or closure/downsizing). It is also the case that information on potential career paths and ongoing educational opportunities can be difficult to source and gather.

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

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

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

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

VISION TO 2020

Through increased collaboration between the North-East Regional Skills Forum and members of the North-East Regional Enterprise Committee, a more comprehensive picture of skills will be established which will be focused on linking enterprises and education providers and can be used to retain workers and attract increased investment.

KEY ACTIONS TO 2020

Action 1:

As part of the Skills for Growth initiative the Regional Skills Forum will assist local enterprises in the North-East identify their skills' needs through a variety of audit tools to ensure that the Region has the effective use of skills to support economic and social prosperity. Once skill needs have been identified, Regional Skills Fora will link companies with the education and training providers best suited to responding to identified skills need.

Timeframe for delivery: Q4 2019

How will delivery be measured:
Number of enterprises audited.

Responsibility: RSF, and partners including EI, IDA Ireland, ETB, and DEASP

Action 2:

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

Timeframe for delivery: Q4 2019

How will delivery be measured:
Number of participants

Responsibility: ETB, Regional Skills Forum.

Action 3:

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

Timeframe for delivery: Q2 2019

How will delivery be measured:
Number of successful applications.

Responsibility: RSF, HEIs.

Action 4:

Support all actions in the Regional Enterprise Plan where linkages to Education and Training Providers are required.

Timeframe for delivery: Ongoing

How will delivery be measured:

Customer feedback

Responsibility: RSF

Action 5:

Communicate to employers the services available through Regional Skills Forum to assist with resolution of emerging skills needs.

Timeframe for delivery: Ongoing

How will delivery be measured:

Increased number of engagements

Responsibility: RSF and other stakeholders.

Action 6:

Support the Regional Skills Forum in establishing formal engagement between Dundalk IT, the Education and Training Boards and specific industries (precision engineering, fintech, and bio-economy) in the Region and developing apprenticeships, with particular regard to planning for new and emerging skills sets over the longer term.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

Model successfully agreed and implementation commenced.

Responsibility: DKIT, ETB

Action 7:

The education providers in the region, include the ETBs and Dundalk Institute of Technology, will explore development of a model where collaborative opportunities are initiated to address skills gaps with both short-term pre-employment and existing employee upskilling training interventions.

Timeframe for delivery: Q4 2019

How will delivery be measured:

Model successfully agreed and implementation commenced.

Responsibility: DKIT, ETB, and other relevant stakeholders

STRATEGIC OBJECTIVE

3

Strengthen SME resilience in the North-East so as to achieve development and growth in the face of external challenges

CONTEXT

Micro, small and medium sized enterprises (SMEs) are a major contributor to the Irish economy, accounting for 99.8 percent of all businesses and for 68.4 percent of those engaged in the business sector.

The North-East is home to 12,983 SMEs, with most employing less than ten people. For many owners or managers, the demands of keeping a business profitable and viable week to week outweigh the need to give time to consider resilience, or how to bounce back from shocks to a business. By investing more in innovation, research and development, and diversifying markets, an SME is more likely to be able to withstand headwinds as they gather. SMEs need to be encouraged to make and take the time to access the existing supports available to them.

Brexit the most significant challenge facing Irish enterprise in over 50 years. This will be particularly challenging for businesses in the Border region. Preparation is key; not only at Government level but, crucially, at firm level. It is important that businesses plan and prepare for Brexit and the changes it will bring. The Government has put in place a number of supports to help businesses, of all shapes and sizes and across all sectors of the economy, to prepare for Brexit.

It is important to develop, enhance and highlight the framework of supports that exist to support the region's SMEs to build a greater degree of resilience when operating in turbulent business environments.

By working together in a more collaborative way, SMEs in particular sectors can achieve economies of scale, share best practices and reap the benefits of concentrations of activity.

VISION TO 2020

To support SMEs in the North-East region to be able to increase their resilience and be able to withstand external challenges, including Brexit, through enhanced mentoring, innovation, and R&D.

KEY ACTIONS TO 2020

Action 1:

Deliver a new Plato Programme across the North-East region which will support SMEs through mentoring and networking.

Timeframe for delivery: Q4 2019

How will delivery be measured: Programme successfully delivered

Responsibility: LEOs, EI

Action 2:

Enterprise Ireland and the Local Enterprise Offices will encourage and support participation at national and international trade-shows.

Timeframe for delivery: To end of 2020.

How will delivery be measured:

Increase in numbers attending, increase in revenue from trade shows.

Responsibility: EI, LEOs.

Action 3:

Increase the number of agri-food companies that are supported by the LEAN Six Sigma Green Belt programme at DKIT.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

Increase in the number of agri-food companies supported by the LEAN programme

Responsibility: LEOs, DKIT

Action 4:

Develop a volunteer mentor programme in the North-East modelled on the Corporate Social Responsibility (CSR) Microsoft-LEO partnership in the Dublin area.

Timeframe for delivery: By end of 2020.

How will delivery be measured:

Programme designed, agreed and implementation commenced.

Responsibility: LEOs, EI

STRATEGIC OBJECTIVE

4

Drive a higher level of economic success in the North-East by building on niche strengths and fostering clustering amongst enterprises

CONTEXT

Regional sectoral clustering initiatives support the development of business-led sectoral clusters of competitive advantage, including through collaboration between SMEs, and also with multinationals, higher education and the enterprise agencies.

Clustering in the North-East in the areas of engineering, the bio-economy, financial services, and agri-food will provide the opportunity for smaller firms to learn the wider aspects of their business sector and to share that learning and expertise. It also strengthens a firm's capacity to supply and co-supply as part of a major multinational and international contract opportunities.

Recent funding awards to collaborative projects in the North-East will support these efforts at clustering.

Under the Regional Enterprise Development Fund (REDF) €4.9 million was awarded to the Bioconnect Innovation Centre. This project will support the performance of cutting edge biotechnology research by companies in the region through the provision of office, laboratory, and biotechnology focussed research capabilities. The project will bring together, for the first time, a number of marine and agri-food companies in this region and beyond, to work together on research agendas in one centre where they will network, share learnings, create knowledge and drive research agendas which will directly benefit the membership. This is an exciting development which will have national as well as regional impact.

To establish a network of engineering companies and stakeholders in Monaghan, Cavan, and Louth, €250,000 was awarded to the Focused Engineering Network under the REDF. This initiative will safeguard and further develop the engineering sector in the region with supply chain being the initial opportunity to be explored forging linkages within and beyond the region.

The implementation of these projects will provide important learnings for potential clustering initiatives in other sectors within the region in financial services, payments, and agri-food.

VISION TO 2020

The region's key activities in areas such as precision engineering, bio-economy and financial services will have been considerably strengthened to increased strategic collaboration and clustering in order to provide economies of scale and greater business opportunities and growth.

KEY ACTIONS TO 2020

Action 1:

Support the establishment of the Focused Engineering Network and engage with its stakeholders to boost this niche industry in the North-East.

Timeframe for delivery: To be outlined by the Focused Engineering Network DAC

How will delivery be measured:

Network established and benefits realised.

Responsibility: Focused Engineering Network DAC

Action 2:

Leverage the opportunities presented by the recent funding of the Bioconnect Innovation Centre to advance the bio-economy industry.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

- Metrics to be agreed with EI as part of the REDF process

Responsibility: Bioconnect Innovation Centre CLG

Action 3:

Explore the establishment of similar network in financial services, payments and agri-food to support the sharing of ideas and peer to peer learning within the region. Seek to extend and connect these networks with aligned activities outside of the region and on a North-South basis.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

- Business Plan developed for the development of focused networks in each sector

Responsibility: LEOs, EI, IDA, ITI

Action 4:

Develop more opportunities between LEO, EI and IDA clients with Enterprise Ireland/IDA Ireland Global Sourcing Events.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

Measurable increase in attendance at events along with increase in contracts.

Responsibility: EI, IDA, LEOs

STRATEGIC OBJECTIVE

5

Strengthen the attractiveness of the North-East as a destination to visit

CONTEXT

Tourism will continue to be one of the key sectors in the future economic development of the region and offers significant potential for the creation of new jobs across all counties in the region. There is strong potential to develop tourism products that harness existing linkages across the region with regard to history, geography, economic development, folk tradition, language and musical heritage as well as activity based and marine tourism. The development of the tourism product for the North-East is also important for strengthening the region's appeal for talent and business investment.

Tourism is now one of the largest and most important sectors of the economy, providing employment for approximately 235,000 people, an economic contribution of €7.1 billion and Exchequer revenue of ca. €1.7 billion, which helps fund other key public services. The economic contribution tourism makes, and the employment tourism generates, has importance beyond what these very impressive numbers indicate. More so than any other sector, tourism jobs are jobs for all. Whether someone is a senior executive, a chef, a guest service manager, a cleaner, a software programmer, or a wide range of other careers, tourism creates jobs that are uniquely wide in variety. Tourism jobs have the potential to be well dispersed and play an essential role in a geographical balance in the development of Ireland.

Ireland has had tremendous tourism success in recent years and tourism has played a critical role in helping to re-grow our economy, looking to the future, there is significantly more opportunity for further growth in tourism to increase economic contribution, employment and revenue.

The North-East will need to develop more immersive experiences, as required by today's tourists. There is also a need to increase industry capability and knowledge within product development, sales, customer service, technology, and foreign languages.

A significant opportunity exists to address the issues identified above under the emergence of the Visitor Experience Development Plan (VEDP) for Ancient within the Ireland's Ancient East brand.

The North-East Regional Enterprise Plan will support the delivery of these tourism development opportunities by fostering a collaborative approach that brings together the various stakeholders to work together to advance their objectives.

VISION TO 2020

The North-East will be an established tourism destination for both the domestic and overseas tourists seeking out an experience. The development of the 'Ancient' visitor experience will be pivotal in increasing dwell time for visitors to the North-East, deliver increased employment opportunities, and contribute to the economic growth of the region.

KEY ACTIONS TO 2020

Action 1:

Support the areas of the Visitor Experience Development Plans that deliver on the Priority Development Projects identified through stakeholder collaboration and industry workshops in the North-East.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

In increased visitor numbers; lengthening of the tourist season; increased employment in tourism.

Responsibility: Fáilte Ireland, Local Authorities, OPW, Local Development Groups, Leader Companies, Waterways Ireland

Action 2:

Develop the 'ancient visitor experience' for the area within the North-East (incorporating Meath and Louth) by identifying 'Ancient and Sacred' sites that have the potential to increase the appeal of the destination and offer opportunities for employment growth.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

In increased visitor numbers; lengthening of the tourist season; increased employment in tourism.

Responsibility: Fáilte Ireland; Local Authorities; OPW

Action 3:

Identify and activate the 'destination town' concept for the North-East ensuring visitor expectations to the town are exceeded. Support the development of and deliver major international festival for the region; and explore how the 'Hidden Heartlands' concept can be leveraged in Cavan.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

In increased visitor numbers; lengthening of the tourist season; increased employment in tourism.

Responsibility: Fáilte Ireland; Local Authorities; OPW and State Agencies.

Action 4:

Support the development of and deliver major international festival for the region.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

In increased visitor numbers; lengthening of the tourist season; increased employment in tourism.

Responsibility: Fáilte Ireland; Local Authorities; OPW

Action 5:

Fáilte Ireland will work with the relevant Local Authorities to identify and support capital investment for projects to enhance Tourism Infrastructure.

Timeframe for delivery: 2019 - 2020

How will delivery be measured:

In increased visitor numbers; lengthening of the tourist season; increased employment in tourism.

Responsibility: Fáilte Ireland; Local Authorities; OPW

3 Enterprise Agency and LEO activities in the North-East to 2020

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

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

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

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

Enterprise Ireland

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

- Assisting clients to create 60,000 new jobs by 2020 while sustaining the existing record level of jobs;
- Growing the annual exports of client companies by €5bn to €26bn per annum;
- Increasing the level of spend made by client companies in the Irish economy by €4bn to €27bn per annum by 2020; and
- Inspiring more Irish owned companies to have global ambition.

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

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

- the highest employment in the 20 year history of the agency with 215,207 people employed in Enterprise Ireland supported companies;
- the successful number of net jobs created which saw 9,119 new jobs created after losses are taken into account, with over 60 percent of these outside Dublin;
- the lowest number of job losses since 1998; and
- employment growth across all regions.

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

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

Enterprise Ireland's Regional Plan 2019 builds on this Strategy. It is a plan which identifies "National Initiatives" that are impactful and will develop regions of scale.

The plan entails a vision that is ambitious and proposes a number of new initiatives which will have significant impact on economic development in the regions. The plan is founded on four core objectives:

- To maximise growth of Enterprise Ireland Clients in the regions
- To strengthen Regional Infrastructure to maximise future growth of Irish Enterprise in the Regions
- To support Entrepreneurship in the Regions
- Work in collaboration to deliver Regional Growth

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

Enterprise Ireland in the North-East

The North-East is home to 322 client companies which employ just 17,391 people in the region. The region has seen a notable increase in employment over the years, with a 3 percent increase in the North-East from 2017.

- Enterprise Ireland supports all sectors with success in construction and food.
- Enterprise Ireland has co-funded, with local enterprise development groups, 157 Community Enterprise Centres across the country including 40 in the North-East Region.
- Enterprise Ireland, in partnership with the Institutes of Technology, has established a nationwide network of 15 Technology Gateways which deliver technology solutions for Irish industry close to their market needs and are open to all sizes of companies. There are two Gateways located in the North East North West; WiSAR - Wireless Solutions and PEM - Precision Engineering & Manufacturing
- Enterprise Ireland has funded the establishment of a national network of business innovation centres and specialist bio-incubation facilities across the Higher Education Sector. The region is home to three campus incubators.
- EI supports and collaborates with HEIs in the region including DKIT, LyIT and IT Sligo through Innovation supports such as the Commercialisation Fund, Innovation Partnerships and Innovation Vouchers.

Local Enterprise Offices

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

Public Procurement and other regulations affecting business.

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

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

The Border Region is served by its Local Enterprise Offices in Cavan, Donegal, Leitrim, Monaghan and Sligo which are co-located with the Local Authorities. In 2017, the LEOs operating the Border Region supported an additional 432 jobs from 2016 (total of 4,920 jobs) and the establishment of 6 new companies, bringing the total number of companies supported by the LEOs in the Border Region to 944.

IDA Ireland

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

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

- Win 900 new investments for Ireland
- Support clients in creating 80,000 new jobs
- Grow market share and help maximise the impact of FDI investments
- Focus on greater balanced regional development

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

- Worked with public bodies and the private sector on the Regional Enterprise Plans
- Worked with existing clients to retain and strengthen their presence in each region
- Increased Global Business Services and High-Tech Manufacturing investments
- Aligned IDA business sectors with regional strengths to develop sectoral ecosystems
- Work more closely with EI and its client companies to identify synergies, enhance clusters, participate in site visits and maximise benefits for the region through the Global Sourcing Program
- Delivered property solutions in designated regional locations
- Increased IDA Ireland's regional footprint to adequately support the regional strategy

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

the demographical challenges that exist and international trends of greater urbanisation.

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

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

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

- Critical mass in population
- The ability to attract and develop appropriate skills
- The presence of Third Level Institutes
- The existence of clusters of companies in specific industry sector
- Regional Infrastructure
- Regional Place Making Strategies
- Availability of high spec standard Manufacturing & Commercial Office Properties

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

Over the course of 2019, IDA Ireland will be developing the agency's new five-year strategy. This strategy will take account of the changing nature of work and the impact of technology on specific sectors. Profound changes are occurring in the world of work and this is already reflected

in the jobs being created by the IDA Ireland client base. We can see an increasing complexity in the roles being created, technology skills becoming ubiquitous across roles, increasing demand for business professionals and a fall in the number of low-skilled jobs including back office support and basic manufacturing. This transition is likely to impact the nature and type of roles across the Regions of Ireland.

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

IDA in the North-East

The North-East consists of the counties of Monaghan, Cavan and Louth. IDA Ireland supports 40 companies employing 5,161 people in the region through the agency's offices in Cavan and Dundalk. The region has a successful track record in attracting FDI with employment in IDA Ireland supported companies increasing by 13% since 2015.

There are vibrant and thriving concentration of well-established Engineering and Life Science companies located in the region. These clusters have been complemented in recent years by new investments from the Financial Services, Global Business Services and Technology sectors. Some of the leading employers in the North East include global leaders such as ABB, Becton Dickinson, CG Power, National Pen, PayPal, Vesta, and YapStone.

IDA Ireland continues to market and position the North East to potential investors from across the globe, particularly in the areas of Manufacturing and Global Business Services. The diversity of sectors and activities as well as the quality of jobs and investments in the region has been significantly enhanced by recent announcements of expansions and new investments arriving in Ireland and the Region for the first time e.g. Almac in Dundalk, Entekra in Monaghan, Wasdell and Wuxi in Dundalk. The New Name Biopharma investments secured from Almac, Wasdell and WuXi in the past 2 years leverage IDA Ireland's investment in serviced property solutions in the

region and will directly create approximately 1,000 high value manufacturing jobs and several hundred construction related jobs. Entekra plan to create 100 new engineering and design jobs in Monaghan, leveraging the strengths of the engineering capability and education programmes in the region. IDA Ireland will continue to work with companies on their Research & Innovation agenda to increase this activity and drive engagements with education, research and training centres across the region and nationally.

IDA's focus over the coming period is to build on the strengths and competencies of the region with a particular focus on opportunities arising in Life Sciences, FinTech, Engineering and Global Business Services. New and emerging technology opportunities will create new opportunities in areas of data analytics, artificial intelligence, smart manufacturing, global business services and new approaches to work such as home and hub working. To strengthen the offering of the region to international investors, IDA Ireland has commenced construction of an Advanced Building Solution on IDA's Business and Technology Park in Dundalk and will commence work on an Advanced Building Solution on IDA owned lands in Monaghan. These investments are part of IDA €150 Million property investment plan to support the delivery of IDA's current strategy of increasing FDI investment in the regions. IDA Ireland will also be promoting the region as a location for second site solutions, high value manufacturing, fintech and remote working. IDA will continue to work closely with Enterprise Ireland and its indigenous base of companies to identify synergies, enhance clusters, participate in site visits and maximise benefits for the region.

A concerted and continuous collaborative approach by all regional stakeholders is a key enabler in winning investment for the region. IDA partners with local authorities, educational institutes and national and local enterprise agencies to build and create the strong possible proposition for existing and future potential investors. The North East is very well positioned to continue to attract new FDI investment and grow employment in existing companies and IDA will continue to collaborate with all stakeholders and parties in the region to achieve this under the Regional Enterprise Plan.

4 Implementation of the Regional Enterprise Plan

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

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

- Provide a forum for the sharing of updates and information by members on key enterprise development initiatives including those set out by the Agencies and LEOs in this Plan and other pertinent updates (incl. REDF, RSES, Project Ireland 2040 etc.).
 - Oversee, contribute to and sign off (through the Chair) on annual Progress Reports to DBEI.
- Full details of the composition of the Steering Committee is contained in Appendix 1.
- The Chairperson will convene at least three meetings of the Steering Committee per year and will present a progress update on their Plan to the Minister at an annual meeting of all Chairpersons in the second half of 2019. This meeting will provide a fora for the Chairs to share good practice and identify potential areas for inter-regional co-operation. The Chairperson will also lead the Committee in the preparation of two progress reports to be submitted to the Department at the end of 2019 (mid-term) and end of 2020 (final report).
- It is intended that each Steering Committee will oversee the formation of smaller working groups to drive delivery of actions or groups of actions in the REP. Working Groups will convene as frequently as is required and will report on progress to the Chairperson and the Steering Committee on a regular basis. They will also provide input to the annual progress reports in relation to their action(s).
- Oversee and drive delivery of the REP.
 - Agree an annual work programme for the Committee based on the Plan.
 - Nominate and secure 'Champions' to support delivery of the Strategic Objectives.
 - Agree key milestones and metrics for delivery of each actions.
 - Oversee the formation of working groups as necessary to drive implementation of actions.
 - Explore and propagate new ideas and opportunities for collaborative projects, and funding.

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

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

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

Targets for the North-East Region to 2020

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

- employment growth of between 10 and 15 percent; and
- an unemployment rate reduced to within one percentage point of the State average.

The North-East Region is comprised of Cavan, Monaghan and Louth. For labour force data purposes, the North-East is located within the Border region (Cavan and Monaghan) and the Mid-East Region (Louth). Utilising new data from the CSO Labour Force Survey (LFS)³, the rate of growth and unemployment rates achieved for the Border region during the 2015-2017 lifetime of the original Regional Action Plans and up to Q3 2018 are outlined in Table 1.

The rate of growth and unemployment rates achieved for the Mid-East region during the 2015-2017 lifetime of the original Regional Action Plans are outlined in Table 2.

There is a significant difference in the dynamic of employment growth between the Border region and the Mid-East. The eastern parts of the North-East are within the influence of the Dublin city region and the Dublin-Belfast corridor, while more rural parts of the central Border area including Cavan and Monaghan have a different economic dynamic.

It is very encouraging that the unemployment rate in the Border region at the end of the RAPJ period (Q1 2018) was the lowest of all the regions. Latest figures on unemployment show that the unemployment rate was 5.1 percent in Q3 2018. The Border Region currently has the second lowest unemployment rate. Under the new LFS, unemployment numbers for the Border region have tended to fluctuate from quarter to quarter so it would be prudent to monitor the data over a longer period to discern any dominant pattern⁴. For a further statistical analysis of the region's performance see Appendix 2.

Latest figures on commuting from the North-East (Census 2016) suggests that 16,379 people are leaving the region to work, school or college daily. This indicates that there is capacity for increased investment and economic activity in the North-East.

The focus for the North-East over the period to 2020 will be to maintain an emphasis on employment growth, aiming to out-perform the rate of growth achieved since 2015 to date and to ensure that sustainable, quality jobs are created and maintained in the Region. The strategic objectives and actions in this Plan, along with the core activities of the various Agencies and Bodies involved in supporting enterprise development over the coming two-year period will support this.

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

⁴ Note: Regional LFS employment data is not seasonally adjusted.

Table 1

| | Numbers Employed | | | | Unemployment Rate | |
|---------------|------------------|-----------|---------------------------|---------------------------|-------------------|---------|
| | Q1 2015 | Q3 2018 | Change Q1 2015 to Q3 2018 | Growth Q1 2015 to Q3 2018 | Q1 2015 | Q3 2018 |
| Border | 169,500 | 178,300 | 8,800 | 5.2% | 8.6% | 5.1% |
| State | 2,014,400 | 2,273,200 | 258,800 | 12.8% | 10.5% | 6.0% |

Source: CSO Labour Force Survey, Q3 2018

Table 2

| | Numbers Employed | | | | Unemployment Rate | |
|-----------------|------------------|-----------|---------------------------|---------------------------|-------------------|---------|
| | Q1 2015 | Q3 2018 | Change Q1 2015 to Q3 2018 | Growth Q1 2015 to Q3 2018 | Q1 2015 | Q3 2018 |
| Mid-East | 294,900 | 327,100 | 32,200 | 10.9% | 9.6% | 5.8% |
| State | 2,014,400 | 2,273,200 | 258,800 | 12.8% | 10.5% | 6.0% |

Source: CSO Labour Force Survey, Q3 2018

Appendix 1: Membership of the Regional Steering Committee

Organisations represented on the North-East Steering Committee⁵

Chair of the North-East Committee

Richard Hanlon
SVP, Vesta Payment Solutions

Membership of the Committee:

| | |
|--------------------------------------|---|
| Enterprise Champions | Dundalk Chamber |
| Louth County Council | Drogheda Chamber |
| Cavan County Council | Western Development Commission |
| Monaghan County Council | InterTradelreland |
| IDA Ireland | Teagasc |
| Enterprise Ireland | Fáilte Ireland |
| Louth Local Enterprise Office | Waterways Ireland |
| Monaghan Local Enterprise Office | Bord Iascaigh Mhara |
| Cavan Local Enterprise Office | SEUPB |
| Northern & Western Regional Assembly | Ibec |
| Eastern & Midland Regional Assembly | Lakeland Dairies |
| Dundalk Institute of Technology | Combilift |
| North-East Regional Skills Forum | Department of Business, Enterprise and Innovation |
| Cavan & Monaghan ETB | D/Environment, Community & Local Government |
| Louth & Meath ETB | D/Social Protection |
| Cavan Chamber | Department of Arts and Heritage |

Secretariat/Programme Management

Ronan Denny

⁵ The existing Implementation Committees will be renamed 'Steering Committees'

Appendix 2: Brief profile and statistical snapshot - North-East

| Constituent counties | Cavan, Monaghan and Louth ⁶ | |
|--|---|----------------|
| Regional Population & change (1996-2016) | 196,423 (1996): 266,446 (2016) increase of 70,023 | |
| GVA ⁷ per person 2000 and 2015 | €16,147: €19,060 | |
| Total in employment | 178,300* | |
| Labour Force Participation rate | 59.3%* | |
| Unemployment rate | 5.1%* | |
| Unemployment blackspots ⁸ | 4 ⁹ | |
| Percentage employed in Manufacturing: Services: Public sector | 16%: 16%: 26% | |
| Educated to third level in North-East: State | 36%: 45% | |
| Third Level Students (full-time & part-time) | 4,977 ¹⁰ | |
| Number of enterprises ¹¹ (micro: small: medium: large) (2016) | 11,891: 937: 155: 17 | |
| Number of Enterprise Ireland High Potential Start-Ups ¹² (HPSUs) North-East: State (2017) | 4: 90 | |
| EI supported employment & no. client Companies 2016 - 2017 | 2016 | 2017 |
| | Jobs: 16,208 | Jobs: 16,938 |
| | Companies: 341 | Companies: 336 |
| IDA supported employment & no. client companies (2017) | 2016 | 2017 |
| | Jobs: 4,914 | Jobs: 5,007 |
| | Companies: 33 | Companies: 36 |
| LEO supported employment & no. client companies (2017) | 2016 | 2017 |
| | Jobs: 2,845 | Jobs: 3,210 |
| | Companies: 592 | Companies: 593 |
| Number of LEO Priming Grants ¹³ North-East: State (2017) | 17: 294 | |

- Due to regulation changes, the 'NUTS3' regional groupings (used by the CSO to compose regional employment data) have recently been updated. Under the new groupings, County Louth has moved from the Border to the Mid-East region and what was formerly South Tipperary has moved from the South-East to the Mid-West Region. From Q1 2018, CSO Labour Force Survey data has been updated to take account of these changes. In the Regional Enterprise Plans, Louth will continue joint projects, collaboration and links with both the North-East and the Mid-East as will South Tipperary in both South-East and Mid-West Region.
- Gross Value Added (GVA) is the measure of the value of goods and services produced in an area, industry or sector of an economy.
- Unemployment Blackspots are defined as Electoral Districts with at least 200 people in the labour force and an unemployment rate of 27% or higher
- Unemployment blackspots in the Region: Cavan (2), Monaghan (1) & Louth (1)
- Dundalk IT (4,977)
- A Small Enterprise is defined as: an enterprise that has fewer than 50 employees and has either an annual turnover and/or an annual Balance Sheet total not exceeding €10m: A Medium Sized Enterprise is defined as: an enterprise that has between 50 employees and 249 employees and has either an annual turnover not exceeding €50m or an annual Balance Sheet total not exceeding €43m: A large Enterprise is defined as: an enterprise that employs greater than 250 employees, has either an annual turnover of greater than €50m or an annual balance sheet of greater than €43m
- HPSUs are start-up businesses with the potential to develop an innovative product or service for sale on international markets and the potential to create 10 jobs and €1m in sales within 3 years of starting up.
- A Priming Grant is a business start-up grant, available to micro enterprises within the first 18 months of start-up.

* CSO Labour Force Survey Q3 2018, Border Region

The North-East is home to a diverse enterprise mix, with growing concentrations of activity in international business services, mainly Financial Services (M1 Payments Corridor) and consumer goods and manufacturing. The North-East also has vibrant and growing clusters in the food and engineering sectors.

The M1 economic corridor midway between Dublin and Belfast is home to a growing hub of multinational and indigenous companies centred round Dundalk and Drogheda and experiences the benefits of being located within easy reach of the greater Dublin area. It also benefits from strong road and rail links and its proximity to Dublin international airport and Belfast Airport and ease of access to higher education institutions such as Dundalk Institute of Technology and the universities in Dublin and Belfast.

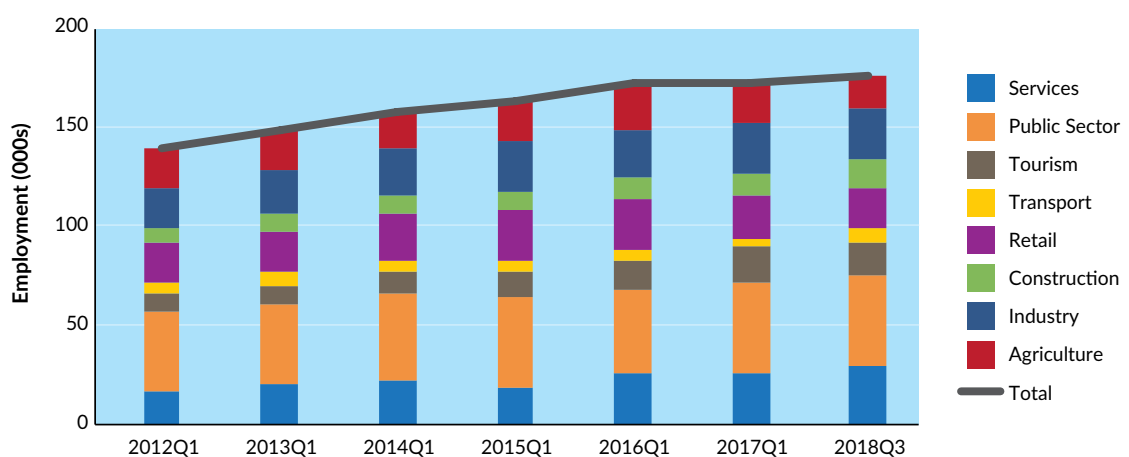
Dundalk Institute of Technology (DkIT) is an extremely important asset for the North-East Region. The Institute’s research and innovation agenda, within both established and emerging areas is driven by various research teams which are embedded across the Institute’s four academic schools. DkIT has always recognised the need to have a diversity of research centres and groups, including academic, industry facing and mission orientated centres.

Brexit presents unprecedented challenges for Ireland given our economic, political and historical relationship with the UK. For the North-East and the rest of the Border region, the affects of Brexit will be most acutely felt.

Employment trends

In Q3 2018 there were 178,300 people employed in the Border region. Over the period Q1 2015 to Q3 2018, employment overall has grown by 5 percent with 8,800 more people employed. The structure of the sectoral employment has changed little over that period, with some adjustments evident. Chart 1. shows the employment figures from Q1 2012 to Q3 of 2018.

Chart 1. Border Region Employment Growth 2012-2018 (CSO)



Services

Employment in the Services sector, including the Public Sector, has increased significantly from 98,200 in 2012 to 122,000 in Q3 of 2018 and the sector currently accounts for 68 percent of all employment in the Border region. This highlights the contribution to employment in the Border region. There are currently

122,000 people working in the Services Sector and within the broad Services sector, the combined areas of Public Administration/Defence, Human Health/Social Work and the Education sector account for 45,200 of those employed in the Border region which represents 37 percent of all Services employment and 25 percent of the total employment in the region, which is similar to other regions.

Retail/Wholesale

Retail and Wholesale which forms a significant part of the Services sector is the largest private sector employer in the country, with particular significance for regional towns and villages. Employment in the sector in Ireland is regionally dispersed with approximately 70 percent employed outside Dublin, 20,700 people are employed in the sector in the North East/North West region.

Industry/Manufacturing

Employment in the Industry/Manufacturing sector has increased over the period Q1 2012 to Q3 2018 with 4,100 more employed in the Sector. Employment in this sector counts for 13 percent of employment in the region which is above the national figure of 12.5 percent.

Construction

The Construction sector employed 7,800 in Q1 2012 and this numbers has increased to 14,900 in Q3 2018, accounting for 8 percent of the total employment which is similar to the national trend.

Agriculture

The Agricultural sector employed 19,100 in Q1 2012 and had grown to a high of over 23,000 in 2016 but has since fallen to 16,800 in Q3 2018.

Tourism

CSO figures indicate that the Tourism sector employed 16,900 in Q3 2018. However, these figures can be considered as conservative as they only cover employment in accommodation and food services. The actual figure maybe somewhat higher if other "Services" employment, for example in visitor attractions is included.

Appendix 3: Regional Enterprise Development Fund (REDF)

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

Over the first and second calls under the REDF, the North-East secured funding of over €5.4 million across three projects:

| Call | Project | Description |
|------|----------------------------------|---|
| 1 | Monaghan County Enterprise Fund | Food CoE & Food Product Development Supports |
| 2 | Bioconnect Innovation Centre CLG | Office, Lab and Biotechnology Research Capabilities |
| 2 | Focused Engineering Network DAC | North-East Engineering Cluster |

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

Appendix 4: Other State Agencies Supporting Enterprise Development

Local Authorities

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

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

- contribution to Regional Spatial and Economic Strategies,
- a strong direct role for Local Authorities in promoting economic development, more clearly specified in legislation;
- ensuring that all Local Authorities focus their general functions and services proactively towards supporting enterprise and economic development;
- leading and mobilising economic development locally in conjunction with relevant agencies;
- drawing up local economic development plans in conjunction with the overall City/County Development Plan.

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

Bord Bia

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

Bord Iascaigh Mhara (BIM)

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

Fáilte Ireland

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

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

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

InterTradelreland

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

Regional Skills Fora

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

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

Skillnet Ireland

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

Science Foundation Ireland (SFI)

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

Sustainable Energy Authority of Ireland (SEAI)

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

Údarás na Gaeltachta

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

Waterways Ireland

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

Department of Rural and Community Development

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

Third Level Institutes

Dundalk IT

Appendix 5: Project Ireland 2040

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

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

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

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

Project Ireland 2040 Funds

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

Rural Regeneration and Development Fund (RRDF)

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

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

Urban Regeneration and Development Fund (URDF)

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

- Innovative and transformational urban regeneration projects;
- Public-sector led and with the option of community and/or private sector partners;
- Matched by at least 25 percent direct funding from other public and/or private sources;
- A minimum bid of €2m;
- A catalyst for development that would not otherwise occur; and
- Likely to leverage significant further public and private sector investment.

Disruptive Technologies Innovation Fund

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

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

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

Climate Action Fund

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

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

Regional Spatial & Economic Strategies

The counties of Cavan and Monaghan are part of the Northern and Western Regional Assembly (NWRA) while Louth forms part of Eastern and Midland Regional Assembly (EMRA).

Northern and Western Regional Assembly

The NWRA has a leadership role to play in identifying regional policies and coordinating initiatives that support the delivery and implementation of national planning policy. It will also be the way the region

organises for success in economic development – for the entire region – to shape a sustainably resilient place. The RSES adopts unique and innovative ‘place-based’ policies that harness the strengths of initiatives like ‘Action Plan for Jobs’ and ‘Atlantic Economic Corridor’.

Set out in the RSES, by 2027 the collaboration on a focused growth agenda has the potential to generate significant economic growth and increased employment across the region. But both public and private stakeholders in our regions must cooperate to achieve the vision of an urban led, rurally-connected place with high growth and quality of life.

The intent behind the RSES is to provide regional level strategic planning and economic policy in support of the implementation of the National Planning Framework. Our region justifies a particular focus in the National Planning Framework. This is due to a historically lower level of urbanisation compared to other regions, proximity to the border and risks posed by geopolitical dynamics.

The region also has a number of historical challenges impacting on its competitiveness and sustainability. Most notably the comparably lower level of investment in enabling infrastructures such as ports, harbours, utilities, roads, rail and utilities.

The resulting impact has created a profile of a region addressing matters such as:

1. Distance and Scale
2. Skills retention and development
3. Generating Greater Value From Our Knowledge and Innovation System
4. Access to Capital to Fund Innovation
5. Infrastructure and Accessibility
6. Perception of this region and associated narrative

A concerted response is required. A certain level of infrastructure, quality of education, advanced producer services and quality of life are needed to support informational-type economic activities and businesses.

In the absence of centres of scale that can provide these items, certain economic activities will not operate in the region and specific groups of workers will migrate out of the region. If these resources are lost, the region risks entering a vicious circle of regional economic decline.

Thus, the NWRA is concerned with initiatives that focus on achieving higher economic growth from both the existing (or mature) sectors of our economy as well as those that are new or emerging.

We need to supply the right housing, infrastructure, jobs and services where and when communities need it. We must be even better at the things we do well to create new growth. We are perfectly positioned to lead development if we connect our strengths as a low carbon, green and natural economy.

The primary vehicle for delivering the NPF is through the implementation of Regional Spatial and Economic Strategies. This strategy aims to provide regional level strategic planning and economic policy in support of the implementation of the National Planning Framework and provide a greater level of focus around the National Policy Objectives and National Strategic Outcomes.

Eastern and Midland Regional Assembly

The EMRA was established on 1st January 2015. The Region covers nine counties containing twelve Local Authorities namely – Longford, Westmeath, Offaly, Laois, Louth, Meath, Kildare, Wicklow, Fingal, South Dublin and Dun Laoghaire-Rathdown County Councils and Dublin City Council. 43

EMRA's responsibilities include:

- European functions; Manage EU Regional Operational Programmes and provide support to the EU Committee of the Regions through the Irish Regions European Office in Brussels
- Planning and Economic Development; Promote and co-ordinate strategic planning and sustainable development of the region, which includes the implementation of the Regional Planning Guidelines, to be replaced by the new Regional Spatial and Economic Strategies
- Promote effectiveness in local government; Promote the effective delivery of public services in the region in conjunction with the National Oversight & Audit Commission.

Regional Spatial and Economic Strategy

One of the principal statutory functions of the Assembly is the delivery of a Regional Spatial and Economic Strategy (RSES), to support the implementation of Project Ireland 2040 and the economic policies and objectives of the Government by providing a long-term strategic planning and economic framework for the development of the Regions.

The RSES includes a:

- **Spatial Strategy** – to manage future growth and ensure the creation of healthy and attractive places to live, work, study, visit and invest in.
- **Economic Strategy** – that builds on our strengths to sustain a strong economy and support the creation of quality jobs that ensure a good living standard for all.
- **Metropolitan Plan** – to ensure a supply of strategic development areas for the sustainable growth and continued success and competitiveness of the Dublin metropolitan area.
- **Investment Framework** – to prioritise the delivery of key enabling infrastructure and services by government and state agencies.
- **Climate Action Strategy** – to accelerate climate action, ensure a clean and healthy environment and to promote sustainable transport and strategic green infrastructure.

Economic Strategy

This is the first time that Irish planning is required to deliver an economic strategy as part of a regional spatial plan, which identifies regional assets, opportunities and pressures along with funding and investment priorities for the region. The RSES seeks to promote smart specialisation and clustering underpinned by an orderly settlement strategy and investment in 'placemaking'. The RSES Also sets out Regional Policy Objectives (RPOs) to provide a competitive and resilient economic base and develop our skills, innovation and technology capacity, recognising the key roles played by the enterprise agencies (IDA, EI, LEOs, SFI) and to support the implementation of Regional Action Plans for Jobs (RAPJs) and Local Economic and Community Plans (LECPs).

Implementation

The RSES will be implemented through the review of all Local Authorities Development Plans and LECPS after the adoption of this Strategy. Key state agencies and sectoral bodies will also have to consider their strategies and investment plans in light of the adoption of the RSES. The RSES will be realised by the delivery of European and National funding that will achieve the Regional Strategic Outcomes expressed in the Strategy. These funds will focus on the priorities and key aspects of the RSES to sustainably grow the region to 2031 and beyond.

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