

Mid Term Evaluation of the Southern and Eastern Regional Operational Programme
2014-20

Appendix 1 – Review of External Developments –FINAL

May 2019



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1. APPENDIX 1A: REVIEW OF EXTERNAL DEVELOPMENTS: SOCIO–ECONOMIC TRENDS

Table 1: Key National and Regional Socio-Economic Trends

Relevant Outputs	Key Findings	Implications on ROPs
Key National and Regional Socio-Economic Trends		
Economic Output	<p>The Irish economy has experienced a significant improvement since the programme's inception.</p> <p>Nationally, Ireland's GDP rose from €52,180m in 2014 to €78,200m in the same quarter in 2018¹. This growth has also been reflected at a regional level. In 2014, the GDP per person in both regions stood at €23,756 in the BMW region and €45,275 in the S&E region. Figures released by the CSO in 2016 showed that GDP per person in both regions saw a sharp increase, particularly in the S&E region, with figures rising to €26,675 per person in the BMW region, and €70,953 per person in the S&E region in 2016².</p> <p>EU- In 2016, the Southern and Eastern region ranked in the top 3 regions for GDP per inhabitant, at more than twice the EU average³. The main reason for the particularly high Irish GDP growth rates is due in part to the low corporation tax rates, which attracted a number of large multinational corporations to relocate their economic activities, and more specifically their underlying intellectual property, to Ireland. As a result, sales (production) generated from the use of intellectual property now contribute to Irish GDP rather than to other countries' GDP. Given the size of these companies, the boost to GDP growth has been correspondingly large.⁴</p> <p>The GVA also rose in both regions between 2014 and 2015. Strong growth was evident in the South and Eastern Region, with a GVA per capita in 2014 of €44,635 that increased to €63,179</p>	<p>A drop in growth in national total exports, is an area for further investigation, especially given the uncertainty around Brexit</p>

¹ CSO (2018)

² CSO Statistical Release, 2018, 'County Incomes and Regional GDP'.

³ https://ec.europa.eu/eurostat/statistics-explained/index.php/GDP_at_regional_level

⁴ <http://www.oecd.org/sdd/na/Irish-GDP-up-in-2015-OECD.pdf>

Relevant Outputs	Key Findings	Implications on ROPs
	<p>in 2015. Growth also occurred in the Border, Midlands and Western Region, although not to the same extent, from €21,615 in 2014 to €23,606 in 2015.⁵</p> <p>The Modified GNI (GNI*) indicator from 2014 in Ireland was €148.6 billion and this increased by 22.3% to €181.2 billion in 2017.⁶ Similarly, for the GNI* per capita there was a growth of 20.0% from 2014 with €33,249 increasing to €39,911 in 2016.⁷</p> <p>The volume index of GDP per capita in Purchasing Power Standards (PPS)⁸ when expressed in relation to the European Union (EU28) average.</p> <ul style="list-style-type: none"> • The BMW Region has had declined from 2005 to 2016, decreasing to 15.7% below the EU 28 average of GDP per capita in PPS. • The S&E region has demonstrated growth above the EU 28 average of 100, with GDP per capita in PPS 63% above the EU 28 average in 2005, increasing to 117% above the EU 28 average by 2016.⁹ <p>Summary:</p> <p>GDP in the S&E region and the BMW region increased in the two years following the introduction of ROPs, with the S&E region rising to within the top 3 regions in Europe for GDP per inhabitant. This was mainly due to the increase in large multinational corporations relocating their economic activities, and more specifically their underlying intellectual property, to Ireland resulting in sales contributing to Irish GDP. The increase in GDP per capita is much more marked in the S&E region..</p> <p>GVA per capita also rose within both regions following the ROP's introduction¹⁰. Similar to GDP per capita, the S&E region experienced a much higher degree of improvement in GVA per capita compared to the BMW region. In 2016, GVA per person in the BMW region was €23,606</p>	

⁵ <https://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=raa01>

⁶ <https://www.cso.ie/en/releasesandpublications/ep/p-nie/nie2017/mgni/>

⁷ <https://www.cso.ie/en/releasesandpublications/ep/p-wbn/thewellbeingofthenation2017/economy/>

⁸ Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries.

Please note that the index, calculated from PPS figures and expressed with respect to EU28 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

⁹ <https://ec.europa.eu/eurostat/web/products-datasets/product?code=tec00114>

¹⁰ CSO Statistical Release, 2018, 'County Incomes and Regional GDP'.

Relevant Outputs	Key Findings	Implications on ROPs
	<p>(up from €21,615 per person in 2014), and the GVA per person in S&E was €63,179 in 2016. This is a difference of €39,573 in GVA per person¹¹.</p> <p>On foot of the exceptional growth rate rates recorded in Ireland, a new indicator: the Modified GNI (GNI*) indicator was designed to exclude globalisation effects that are disproportionately impacting the measurement of the size of the Irish economy and promote better insight into the domestic Irish economy. From 2014 Ireland had a GNI* of €148.6 billion and this increased by 22.3% to €181.2 billion in 2017.¹² Similarly, for the GNI* per capita there was a growth of 20.0% from 2014 with €33,249 increasing to €39,911 in 2016.¹³</p> <p>The volume index of GDP per capita in Purchasing Power Standards (PPS)¹⁴ is expressed in relation to the European Union (EU28) average and is set to equal 100. Therefore, when the index is higher than 100, the GDP per head is higher than the EU average and vice versa. The S&E region has demonstrated growth above the EU 28 average of 100, with GDP per capita in PPS 63% above the EU 28 average in 2005, increasing to 117% above the EU 28 average by 2016.¹⁵ In contrast, the BMW Region declined from 2005 to 2016, decreasing to 15.7% below the EU 28 average of GDP per capita in PPS.</p> <p>The disposable income per person across both regions has also seen an improvement since the introduction of both ROPs. At the time of implementation, it was reported that in 2010, disposable income per person in the BMW region was €17,719, and €19,910 in the S&E region. Data published in 2015 by the CSO reported an increase for both regions, with the disposable income per person rising to €17,879 in the BMW region and €21,246 in the S&E region¹⁶</p> <p>The average disposable income at the county level provides an overview of the distribution of wealth in Ireland. The S&E region has experienced 9.05% growth in terms of average disposable income between 2014- 2016, which is 1.55% above the growth of the BMW region. With regards to the Southern and Eastern region, it highlights at the county level how the</p>	

¹¹ <https://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=raa01>

¹² <https://www.cso.ie/en/releasesandpublications/ep/p-nie/nie2017/mgni/>

¹³ <https://www.cso.ie/en/releasesandpublications/ep/p-wbn/thewellbeingofthenation2017/economy/>

¹⁴ Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU28 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

¹⁵ <https://ec.europa.eu/eurostat/web/products-datasets/product?code=tec00114>

¹⁶ <https://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/saveselections.asp>

Relevant Outputs	Key Findings	Implications on ROPs
	<p>highest level of growth in average disposable income is orientated around mid-east Ireland. The BMW region includes 3 counties with growth rates of average disposable income below 6%.</p> <p>National total exports have experienced a drop in rate of growth in 2017, falling to 2.4% from 2.9% in 2012. In 2017, exports of electrical machinery, apparatus and appliances represented the largest decrease reducing by €367 million (-46%) to €424 million. On the other hand, exports of medical and pharmaceutical products increased by €350 million (+16%) to €2,563 million over the same comparative period.¹⁷ A report by the DBEI confirmed that all scenarios analysed regarding Brexit would have a negative impact on this exports figure.</p>	
<p>Labour Force and Employment</p>	<p>There has been a considerable improvement in key figures relating to the labour force and employment since the programme's introduction in 2014. The number employed in Ireland at the beginning of the programme in 2014 quarter 1 (Q1) was 1,950,700, and increased to 2,273,200, (+16.5%) by 2018 Q3. At the regional level, the S&E region experienced a growth in the number of people employed of +14.6% (257,200) from 2014 Q1 to 2018 Q2. This compares to the BMW region that experienced a somewhat lower growth of 10% in the number of persons employed across the same time period.</p> <p>The unemployment rate in the S&E region fell from 13.3% in 2014 Q1 to 6.4% in 2018 Q3, a fall of 6.9% throughout the period the programme has been in operation; the BMW region experienced a larger reduction though starting from a higher rate (19.2%) and reaching a similar level (6.3%). The male unemployment rate has fallen from 14.38% to 6.12% from 2014 Q1 to 2018 Q2. Similarly, the female unemployment rate has also fallen over the same period from 11.86% to 6.18%, a fall of a high 5.68%.</p> <p>As unemployment levels have seen a significant decrease since 2014, the numbers in employment have risen significantly for both males and females. The number of males employed in the S&E region increased by 14.3% over the period, whilst the number of females employed over the period increased by 14.7% from 2014 Q1 to 2018 Q2. As unemployment has dropped considerably throughout the country, the profile of employment still remains relatively unchanged, with the difference in employment across genders remaining similar since the introduction of the programmes.</p>	<p>The ROPs were introduced at a time when unemployment was y high throughout the country. The decrease in unemployment rates experienced since 2014 will ultimately impact demand for new jobs. As a result, this has had consequences for employment aimed outputs within a number of schemes in both regional ROPs.</p>

¹⁷ <https://www.cso.ie/en/releasesandpublications/er/gei/goodsexportsandimportsdecember2017/>

Relevant Outputs	Key Findings	Implications on ROPs
	<p>The labour force participation rate for both regions has increased only slightly between 2014 Q1 and 2018 Q2. (The labour force participation rate is the percentage of the population of working age who are economically active. Economically active is defined as those who are either employed or actively seeking employment). For the S&E region the labour force participation rate has increased by 0.8% from the beginning of the programme in 2014 Q1 to 2018 Q2. Interestingly the majority of this increase came from females whom increased their labour participation rate by 1.2% over the period.</p> <p>National youth unemployment (15-24) also declined between 2014 (20.3%¹⁸) and 2018 (13.7%¹⁹). In 2017, the EU average for youth unemployment was 16.8%, which was above that of Ireland (14.5%) at the time. ²⁰ Similarly, the long-term national unemployment rate declined for Ireland between 2014 (5.7%²¹) and 2018 (2.1%²²)</p>	
Priority 1- Strengthening research, technological development and innovation		
Gross Expenditure on R&D	<p>In 2013, the total Gross Expenditure on R&D stood at €2,870m. This figure rose substantially in 2016 to €3,243m²³.</p> <p>This figure is significantly below the EU average of €10,793m in 2016. ²⁴ The most recent figures released by the OECD in 2016 reported that Ireland's expenditure stood at 1.77% of its GDP, which is below the EU average of 1.94% of its GDP.</p> <p>The policy goal set out in the Government's Innovation 2020 Strategy is to increase overall R&D expenditures to 2.5% of GNP (which is roughly 2.0% of GDP)²⁵. The national figure in 2016 stood at 1.43%²⁶</p>	<p>2016 data shows that Ireland is still behind average EU figures for investment in R&D, both with regard to HERD and BERD. There is a specific need for increased investment in R&D, with the national target not being met, therefore the schemes within this priority that aim to increase this still hold significant importance.</p>

¹⁸ <https://www.cso.ie/en/releasesandpublications/er/qnhs/quarterlynationalhouseholdsurveyquarter42014/>

¹⁹ <https://www.cso.ie/en/releasesandpublications/er/mue/monthlyunemploymentjanuary2018/>

²⁰ https://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment_statistics#Youth_unemployment

²¹ <https://www.cso.ie/en/releasesandpublications/er/qnhs/quarterlynationalhouseholdsurveyquarter42014/>

²² <https://www.cso.ie/en/releasesandpublications/er/lfs/labourforcesurveyquarter12018/>

²³ <https://dbei.gov.ie/en/Publications/Publication-files/R-D-Budget-Survey-Report-2016-2017.pdf>

²⁴ <https://ec.europa.eu/eurostat/documents/2995521/8493770/9-01122017-AP-EN.pdf/94cc03d5-693b-4c1d-b5ca-8d32703591e7>

²⁵ <https://igees.gov.ie/wp-content/uploads/2014/01/R-and-D-Credit-Evaluation-2016.pdf>

²⁶ <https://dbei.gov.ie/en/Publications/Publication-files/R-D-Budget-Survey-Report-2016-2017.pdf>

Relevant Outputs	Key Findings	Implications on ROPs
Investment in R&D	In 2014, the national target for public and private R&D investment stood at 2.0% of the national GDP. In 2016, investment levels were below this, at 1.51% of GDP ²⁷ .	
Firms engaged in R&D projects	Although data was not available from 2014, in 2011, the number of firms engaged in R&D projects of significant scale was 1,070. A target was set to raise this total to 1180 companies by 2017 in the ROPs. According to the European Commission, 1,501 Irish firms were engaged in R&D projects by 2015. This demonstrates the achievement of this target two years before its expected return ²⁸ .	
Spin-out companies greater than 3 years old.	In 2014, the number of spin out companies greater than 3 years old stood at 44. A target was proposed to raise this number to 69 by 2017. By 2016, this target was surpassed, with 109 spin out companies reported to have been active for at least three years. ²⁹ .	
Number of research staff engaged	In 2011, the number of research staff engaged in R&D for higher education in both regions was 3,350 in the BMW region and 12,420 in the S&E region. By 2015 the number of engaged staff rose to 21,899 members of staff in the S&E region, and 4,438 in the BMW region. This represents a significant increase across both regions, particularly so in the S&E region ³⁰ . According to the Science budget 2014-2015, there was an increase of €7m in government funding in R&D between 2014 and 2015. ³¹	
Business Expenditure on Research and Development	Business expenditure in Research and Development also saw an increase between 2014 and 2016. In 2014, BERD for the BMW region was €372m, rising to €384m in 2016. In the S&E region, BERD also increased from €1.5b to €1.8b ³² .	
Higher Education	In comparison to 2016 EU figures, Ireland's BERD stood at 0.8% of its GDP. This is substantially lower than the EU average of 1.32% ³³ .	

²⁷ http://ec.europa.eu/research/horizon2020/pdf/country-performance/ie_research_and_innovation_performance.pdf#zoom=125&pagemode=none

²⁸ <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/base-profile/border-midland-and-western-bmw-region>

²⁹ https://www.knowledgetransferireland.com/About_KTI/Reports-Publications/Review-of-the-outcomes-reported-in-the-KTI-AKTS-2016.pdf

³⁰ <https://www.cso.ie/en/releasesandpublications/er/berd/businessespenditureonresearchdevelopment2015-2016/>

³¹ <https://dbei.gov.ie/en/Publications/Publication-files/The-Science-Budget-2014-2015.pdf>

³² <https://www.cso.ie/en/statistics/multisectoral/businessespenditureonresearchanddevelopment/>

Relevant Outputs	Key Findings	Implications on ROPs
Sector Expenditure on R&D	Ireland's Higher Education Expenditure on R&D (HERD) of 0.30% also falls below the EU average of 0.5%. These figures were reported for 2016 (extracted in 2018) ³⁴ .	
Priority 2- Information and Communication Technologies		
Access to broadband	In 2014, the national % of households that had access to the internet stood at 82%. Since then, this number has risen in 2017 to 89% ³⁵ . This is higher than the EU average of 87% ³⁶ .	Although access to broadband across the country has improved since the introduction of the ROPs, this improvement has been relatively small. The key contract expected to be implemented is behind. Therefore, the targets set within this priority in the ROPs still remain relevant within the socio-economic context.
% Mobile Broadband Subscriptions	Further to an increase in broadband access across the country, the % of broadband subscriptions that were mobile also slightly increased from 47% in 2014 to 49% in 2017 ³⁷ .	
Priority 3- SME support, promotion and capability development		
Active Enterprises	In 2016, there were over 250,000 active enterprises in the private business economy in Ireland, with nearly 1.5 million persons engaged. This represents an increase of 0.5% active enterprises and 5.4% for persons engaged from 2015. ³⁸	
Employment accounted for by SMEs	The % of employment accounted for by SMEs has risen slightly from 69% nationally in 2010 to 70.9% in 2016. This represents a marginal increase over 5 years ³⁹ .	In Ireland there has been a strong increase in the number of people involved in starting a new business. However, as the economy improves and employment increases, this can impact on the number of people looking to start a business which may have implications for the programme moving forwards.
Turnover and GVA accounted for by SMEs	The turnover accounted for by SME base in Ireland experienced a decrease from 51.5% in 2010 to 47.8% in 2015 ⁴⁰ . Furthermore, this trend was also reflected in % of GVA accounted for by SMEs, dropping from 46.8% of national GVA in 2010 to 36.6% in 2016, with an annual total of €66.1 billion ⁴¹ .	

³⁴ https://ec.europa.eu/eurostat/statistics-explained/index.php/R_&_D_expenditure#Database

³⁵ <https://www.cso.ie/en/releasesandpublications/er/iss hh/information society statistics-households2017/>

³⁶ https://ec.europa.eu/eurostat/statistics-explained/index.php/Digital_economy_and_society_statistics_-_households_and_individuals

³⁷ <https://www.cso.ie/en/releasesandpublications/er/iss hh/information society statistics-households2017/>

³⁸ <https://www.cso.ie/en/releasesandpublications/er/bd/businessdemography2016/>

³⁹ Ibid

⁴⁰ <https://www.cso.ie/en/releasesandpublications/ep/p-bii/bii2015/sme/>

⁴¹ <https://dbei.gov.ie/en/Publications/Publication-files/2017-SBA-Fact-Sheet.pdf>

Relevant Outputs	Key Findings	Implications on ROPs
<p>Economic Activity of SMEs (Births/Deaths)</p>	<p>Figures for the economic activity of SMEs have seen an improvement in both enterprise births and deaths since the 2010 figures reported in both ROPs. In 2010, there were a total of 11,200 enterprise births in 2010, rising to 18,100 in 2015⁴². Likewise, the total of enterprise deaths also significantly improved (reduced) from 24,500 in 2009 to 15,316 in 2015⁴³. The most recent figures for economic activity in SMEs were published in 2018, which reported figures in 2015.</p> <p>In EU terms (latest data available is for 2015), Ireland's largest sector of active enterprises, the Services sector, at 51% of total enterprises, is higher than the EU average (47%). In 2015, Ireland had the largest percentage share of active enterprises in the EU for the Construction sector at 20%, and this compares to 15% for the EU average.</p> <p>The enterprise birth rate measures the number of new enterprises in relation to the total population of active enterprises. Ireland had 16,256 enterprise births in 2014 and 15,337 enterprise deaths, a higher level of enterprise births compared to deaths. In 2016, there were over 250,000 active enterprises in the private business economy in Ireland, with nearly 1.5 million persons engaged. This represents an increase of 0.5% active enterprises and 5.4% for persons engaged from 2015.⁴⁴</p> <p>There has been an increase in self-employment in both areas, rising from 310,000 in 2013 Q1 to 338,200 in 2018 Q1 at a national level, representing a growth of 9.1%. At the regional level, the S&E region experienced a growth of 5.9% in self-employment between 2014 and 2018, similar to the growth of 6.1% in BMW region.⁴⁵ In comparison to EU figures, the self-employment rate of Ireland stood at 15.4% of all employment in 2017, just below the EU average of 15.5%.⁴⁶</p>	<p>The Intermediary Bodies have reported that in this strong economy people are less driven and motivated to pursue start-ups as they are more likely to be in more secure employment.</p>
<p>Early Stage Entrepreneurial Activity</p>	<p>The percentage of the country's population (18-64) that were engaged in early entrepreneurial activity was 4.8% in 2014, which was under the EU average of 7.2%. Since then, this figure has risen to a national figure of 8.9% in 2017. In Ireland, approximately 26,800 people reported they were involved in starting a new business in 2017. Ireland ranks 6th highest of 20</p>	

⁴² <https://www.cso.ie/en/releasesandpublications/er/bd/businessdemography2016/>

⁴³ <https://www.cso.ie/en/releasesandpublications/ep/p-bii/bii2015/>

⁴⁴ <https://www.cso.ie/en/releasesandpublications/er/bd/businessdemography2016/>

⁴⁵ Self-employment statistics classified by NUTS2 - CSO

⁴⁶ <https://www.pobal.ie/app/uploads/2018/06/The-2016-Pobal-HP-Deprivation-Index-Introduction-07.pdf>

Relevant Outputs	Key Findings	Implications on ROPs
	European countries. Ireland ranks higher than some developed European economies, such as France, Germany, and Italy. ⁴⁷	
SME Access to Finance	<p>According to the central bank, there was a substantial increase in SME lending, increasing by 28% between Q3 2014 and Q4 2016⁴⁸.</p> <p>Furthermore, according to the EIF SME Finance Index, Ireland ranked 14th within the EU 28⁴⁹ with regard to SME financing, which indicates the state of SME financing in countries in the EU, which contains factors such as loans, equity, credit and leasing, and macro factors (e.g. % of SMEs “feeling that there are no financing obstacles”, bank non-performing loans to total gross loans).</p>	
SME Exports	<p>Overall, exports by SMEs that have received support from Enterprise Ireland have risen by 35.6% between 2011 and 2015.</p> <p>There were 8,545 exporting enterprises in 2016. There were just 263 large exporting enterprises (with over 250 employees) but they accounted for 67% (€79.5 billion) of all exports in 2016. There were 7,900 SMEs exporting goods in 2016 and the total value of their exports was €36.4 billion. This includes 5,007 micro enterprises, which exported €6.9 billion of goods⁵⁰.</p> <p>In 2016, SMEs accounted for the large majority of the number of enterprises exporting to the UK, at 93% of the total number of UK exporters.⁵¹</p> <p>A report by the DBEI confirmed that all scenarios analysed regarding Brexit would have a negative impact on all exporting activity in Ireland⁵².</p>	<p>A drop in growth in national total exports, is an area for further investigation, especially given the uncertainty around Brexit.</p> <p>The impact of Brexit is particularly large in some sectors as a result of a combination of a large scale of Irish-UK trade and the scale of the Brexit impact in the specific sector:</p> <ul style="list-style-type: none"> • Agri-foods • Pharma-Chemicals • Electrical machinery • Wholesale and retail • Air transport
Priority 4- Low Carbon Economy		

⁴⁷ <https://www.enterprise-ireland.com/en/Publications/Reports-Published-Strategies/GEM-Reports/2017-Global-Entrepreneurship-Monitor-Report.pdf>

⁴⁸ <https://www.centralbank.ie/docs/default-source/publications/sme-market-reports/sme-market-report-2016h2.pdf?sfvrsn=4>

⁴⁹ http://www.eif.org/news_centre/publications/eif_wp_43.pdf

⁵⁰ <https://www.cso.ie/en/releasesandpublications/ep/p-tec/tec2016/ees/>

⁵¹ <https://www.cso.ie/en/releasesandpublications/ep/p-ituk/irishtradersandtheuk2016/exportstotheukbysizeofenterprise/>

⁵² <https://dbei.gov.ie/en/Publications/Publication-files/Ireland-and-the-Impacts-of-Brexit.pdf>

Relevant Outputs	Key Findings	Implications on ROPs
National Renewable Energy Consumption	In 2010, renewable energy accounted for just 2% of Ireland's total energy consumption. In 2017, the Sustainable Energy Authority of Ireland projected that this figure will have risen to 13% by 2020, although this will have failed to meet its target of 16% ⁵³ .	<p>The current data available on Ireland's energy efficiency further highlights the importance of the targets set out by the ROPs. Both ROPs aim to improve the carbon economy through the improvement in energy efficiency of homes throughout both regions. The continuation of this goal will contribute to the effort towards achieving Ireland's energy goals.</p> <p>Ireland is not on track to meet its target of energy efficiency, and this trend has been reflected throughout Europe. Therefore, the need to focus on schemes that aim to address this issue remains important</p> <p>Furthermore, despite the improvement in vacant housing stock, the level remains high, and thus still remains relevant to Priority 4 of both ROPs.</p>
GHG Emissions	<p>In 2017, the Environmental Protection Agency reported that in the total national greenhouse gas emissions are estimated to be 59.88 million tonnes carbon dioxide equivalent. This represents a 3.7% increase from emissions in 2014.⁵⁴ Ireland has set a national target to improve its energy efficiency by 20% by 2020. This energy efficiency figure stood at 12% in 2017.</p> <p>This target was set in 2009, suggesting that this target is at risk of not being met⁵⁵.</p> <p>According to the European Environment Agency's (EEA) annual 'trends and projections', assessments show an overall 0.6% emissions increase from 2016 to 2017 in Europe, signalling that this issue goes beyond the national level.</p>	
Housing Stock	Between 2011 and 2016, there has been an improvement in the level of vacant housing throughout the country, a reduction from 230,056 (2011) to 183,312 (2016). This also coincided with an increase in occupied housing figures from 1,660,111 (2011) to 1,707,453 (2016). ⁵⁶	
Energy Poverty	The "Better Energy, Warmer Homes" schemes adopts the definition of energy poverty as households that have expenditure on energy greater than 10% of the household's disposable income. The only figures released for this were in 2009; this estimated the number of households experiencing energy poverty to be 316,712 which is 20% of all households in 2009.	
Priority 5- Sustainable Urban Development		
% Emissions accounted for by transport	A 2017 report by the EPA noted that the percentage of total emissions accounted for by transport had seen a small increase of 4.2%, from 11.347 million tonnes of CO ₂ in 2014 to 11.827 million tonnes of CO ₂ in 2015.	This contributes towards Ireland achieving its target for carbon reduction by 2020.

⁵³ https://www.seai.ie/resources/publications/Irelands_Energy_Projections.pdf

⁵⁴ <http://www.epa.ie/pubs/reports/air/airemissions/ghgemissions/GHG%201990-2015%20April%202017.pdf>

⁵⁵ <https://www.dccae.gov.ie/documents/NEEAP%204.pdf>

⁵⁶ <https://www.cso.ie/en/releasesandpublications/ep/p-cp1hii/cp1hii/hs/>

Relevant Outputs	Key Findings	Implications on ROPs
Deprivation	<p>For both BMW and S&E regions deprivation levels have improved between 2011 and 2016. The BMW region has seen an improvement from an Absolute HP Index Score⁵⁷ of -9.0 in 2011 to -6.7 in 2016. Similarly, the S&E region has experienced an improvement from an index score of -5.4 in 2011 to -2.5 in 2016.</p> <p>The deprivation index score for Ireland overall has also decreased from -6.4 in 2011 to -3.6 in 2016⁵⁸,</p>	<p>There is a need to reduce emissions from transport.</p> <p>The current relevant data has seen an improvement, although continued improvement is needed over the coming years. For example, although deprivation levels have decreased throughout both ROP regions, the BMW region still scores lower than the national average of -3.6.</p>
Trends in modes of transport for commuting (National)	<p>According to the CSO, the number of public transport commuters has risen by 21% between 2011 and 2016, increasing to 174,569 users. Commuting by car also rose by 8%, to 1,229,966 in 2016. The highest increase between 2011 and 2016 was in the number of cycling commuters, rising by 43% to 56,837 in 2016.⁵⁹</p>	
Construction Costs	<p>According to Eurostat, there has been a rise in the cost of construction producer price and costs, with costs rising in Ireland to a construction cost index value of 105.9 in Q2 2018, which is above the EU average of 105.5⁶⁰.</p>	<p>This is having an impact on schemes involving construction, as the projected costs are unlikely to be factored in these cost increases.</p>

⁵⁷ The Pobal HP Deprivation Index measures deprivation on three dimensions of affluence/ disadvantage (Demographic Profile, Social Class Composition and Labour Market Situation)

⁵⁸ <https://www.pobal.ie/app/uploads/2018/06/The-2016-Pobal-HP-Deprivation-Index-Introduction-07.pdf>

⁵⁹ <https://www.cso.ie/en/releasesandpublications/ep/p-cp6ci/p6cii/>

⁶⁰ http://appssso.eurostat.ec.europa.eu/nui/show.do?dataset=sts_copi_q&lang=en

2. APPENDIX 1B: REVIEW OF EXTERNAL DEVELOPMENTS: POLICY DEVELOPMENTS

Table 2: Policy Developments

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
Action Plan for Jobs (Government of Ireland) ⁶¹	<p>Action Plan for Jobs 2018 is the seventh in an annual series of plans (preceded by annual editions including in 2014, 2015, 2016 and 2017) which seek to provide a revised approach to maximise employment across Ireland.</p> <p>The 2018 Action Plan for Jobs⁶² has set additional targets to add up to 50,000 extra jobs, and implement 55 actions, which are underpinned by the following strategic goals:</p> <ul style="list-style-type: none"> • Create 200,000 additional jobs by 2020, including 135,000 outside Dublin; • Grow trade and investment in existing markets and diversify into new markets; • Deliver strong competitive regions to drive regional employment; • Develop and attract high quality talent; • Become a global innovation leader to grow and diversify the composition of our exports; • Drive productivity across all sectors of the economy; and 	<p>Recent developments to this action plan hold relevance to a number of priorities in both BMW and S&E regions:</p> <p><i>Priority 1- Strengthening Research, Technological Development and Innovation for both ROPs</i></p> <p><i>Priority 3- SME Competitiveness</i></p> <p>In summary, the commitments defined within this action plan continue to align with the priorities presented in both ROPs.</p>	<p>The 2018 Action Plan for Jobs holds relevance to a number of specific priority schemes</p> <p><i>Science foundation of Ireland Research Centre Programme</i></p> <ul style="list-style-type: none"> • The action plan highlights the renewal of the first seven SFI research centres, and how the steps necessary to deliver this goal • The SFI have secured a €200m investment from new Exchequer funds for 7 World Class Research Centres over 6 years, and an additional €100m co-investment by over 150 industry partners. 	<p>Number of new researchers in supported entities</p> <p>Number of awards under the Spokes programme in the S&E region</p> <p>Increased number of industry partners engaged with funded strategic research centres in the S&E region.</p>

⁶¹ The Irish Government's Action Plan for Jobs (2014)

⁶² Action Plan for Jobs (Government of Ireland, 2018).

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
	<ul style="list-style-type: none"> Achieve a top 5 competitiveness ranking. 		<p><i>SFI Research Centres-Spokes Programme and SFI Investigators Programmes</i></p> <ul style="list-style-type: none"> An emphasis on the role of the SFI in continuing to extend companies' innovation reach by driving engagement between Irish based industry and academia, with the aim of delivering over 1,000 national innovation projects⁶³. 	
National Reform Programme for Ireland	<p>The National Reform Programme 2018⁶⁴ provides an overview of the macro-economic conditions and obstacles to economic growth. The 2018 National Reform programme builds upon the 2018 Country Report published by the European Commission and Ireland's country specific recommendations for 2017 (covering public finances; public investment and labour market participation; and sustainable resolution of non-performing loans). In addition, they also present the national targets for the five EU 2020 headline target areas (i.e. employment, research and development, climate change and energy efficiency, education and poverty reduction).</p>	<p>The programme outlines a range of supports that are available to SMEs through the Government's "Supporting SMEs campaign".</p> <p>The programme also notes a €2 billion allocated for an Urban Regeneration and Development fund between 2019-2027 to encourage growth in cities and towns. Actions proposed to</p>	<p>The actions proposed in this programme hold importance in relation to a number of specific schemes that have been implemented within the priorities of both BMW and S&E ROPs.</p> <p>The investment of a combined €3 billion towards a new urban and rural regeneration fund until 2027 holds significant importance in regard to the <i>Designated Urban Centres Grant Scheme</i> that aims to improve the urban environments across both</p>	<p>Number of integrated growth centre strategies.</p> <p>Population living in areas with integrated urban development strategies</p> <p>Number of multimodal urban mobility projects implemented.</p> <p>Improvements in the social, economic and physical conditions in selected urban centres based on an urban development index.</p>

⁶³ Action Plan for Jobs (Government of Ireland, 2018).

⁶⁴ https://www.taoiseach.gov.ie/eng/Work_Of_The_Department/Economic_Division/Economic/NRP/National_Reform_Programme_2018.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		<p>ensure this is the acceleration of social housing to meet the housing needs of over 137,000 households. Furthermore, a €3billion regeneration and development fund for rural and urban development over ten years to 2027 has been implemented, alongside the establishment of a new National Regeneration and Development Agency in 2018.</p> <p>In regard to the movement towards a low-carbon economy, this programme highlights the “Warmth and Wellbeing Scheme” that provides energy efficiency upgrades to the homes of people with respiratory conditions⁶⁵.</p>	<p>regions. Particular similarities exist between the <i>Urban Regeneration and Development Fund</i> (allocated €2 billion in the National Development Plan) and the <i>Designated Urban Centres Grant Scheme</i> that both aim to support the sustainable development of Irelands urban areas.</p> <p>The “Wealth and Wellbeing Scheme” highlighted in the programme aligns with both the <i>Social Housing Retrofit and Better Energy Warmer Homes</i> Schemes that aim to support the upgrade of homes to increase energy efficiency⁶⁶.</p>	<p>Non-private car commuting levels in the designated urban centres.</p>

⁶⁵ https://www.taoiseach.gov.ie/eng/Work_Of_The_Department/Economic_Division/Economic/NRP/National_Reform_Programme_2018.pdf

⁶⁶ https://www.taoiseach.gov.ie/eng/Work_Of_The_Department/Economic_Division/Economic/NRP/National_Reform_Programme_2018.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
Building on Recovery: Infrastructure and Capital Investment 2016-2021⁶⁷	<p><i>The Capital Plan – Building on Recovery</i>, published in 2015, sets out a six year framework for substantial infrastructural investment in Ireland out to 2021 with total state backed investment under the Plan amounting to €42 billion over the period. It reflects the Government’s commitment to supporting strong and sustainable economic growth and raising welfare and living standards for all. It includes allocations for Transport, Education, Enterprise & Innovation, Housing, Health, Environment & Climate and other</p>	<p>This plan observes the importance of the improvement of social housing throughout the country. It highlights that everyone should have access to good quality housing suited to their needs at an affordable price and in a sustainable community. Under the Capital Plan, the capital funding of almost €3 billion will be provided in support of the Social Housing Strategy 2020, which aims to increase the supply of social housing by up to 35,000 units and contribute significantly to meeting the housing needs of households on the housing list. In addition, around 35,000 additional social housing units will be developed between now and 2020. A further 75,000 households will have their housing</p>	<p>Within Priority 4- The <i>social housing retrofit</i> scheme refers to committed measures that aim to retrofit vacant social housing stock that will return them to productive use in the regions. The commitment to improve the number of additional social housing units in this plan therefore complement those set out within this scheme.</p>	<p>Number of households with improved energy consumption classification.</p> <p>Greenhouse Gas (GHG) reduction (common output indicator).</p> <p>Increase the average thermal performance of households in the region.</p>

⁶⁷ Department of Public Expenditure and Reform (2015), *Building on Recovery: Infrastructure and Capital Investment 2016-2021*.

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		needs met through leasing and renting in the private rental sector over the period of the Capital Plan.		
National Energy Efficiency Action Plan for Ireland 2017-2020 ⁶⁸	<p>There have been three revised updates from the first report in 2009, and the NEEAP for Ireland 2017 – 2020 sets out progress towards the targets and the measures to maximise progress, at the time of producing this document in April 2017. Significant progress had been made towards this NEEAP targets and the anticipated energy and CO2 savings. Based on the Sustainable Energy Authority of Ireland’s (SEAI) latest assessment, implementation of the third NEEAP has resulted in energy savings of 18,654 GWh of the target 31,925 GWh, representing 12% of the national target of 20% was achieved by the end of 2016</p>	<p>The Action Plan holds particular importance to aspects of the programme that focus on the support toward a low-carbon economy. The National Mitigation Plan is detailed, which sets how Ireland will transition toward a low-carbon, climate resilient and environmentally sustainable economy. It focuses on climate action and emissions reduction, and outlines policies and measures in place and under consideration to reach the national climate goals. The relevant activities from NEEAP include, the national targets for Nearly Zero Energy Buildings. The target for 2020 is for all</p>	<p>This action plan specifically refers to the “<i>Better Energy Warmer Homes Scheme</i>” and reaffirms its commitment to continue to support and develop proven effective energy efficiency measures. Furthermore, the nature of this plan also holds significant relevance to the “<i>Social Housing Retrofit Initiative</i>” within both ROPs.</p>	<p>Number of households with improved energy consumption classification.</p> <p>Greenhouse Gas (GHG) reduction (common output indicator).</p> <p>Increase the average thermal performance of households in the region.</p>

⁶⁸ <https://www.dccae.gov.ie/documents/NEEAP%204.pdf>

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		buildings to achieve Nearly Zero Energy Building Standard from Jan 2019 and for residential buildings to achieve an improvement of 70% over 2005 standards. Overall, the prioritisation of the improvement in housing energy efficiency within both ROPs will help support the achievement of this target.		
National Action Plan for Social Inclusion 2015-2017 ⁶⁹	<p>This is an updated version of the National Action Plan for Social Inclusion that was active in 2014 when both ROPs were introduced. There is now a greater focus on modernising the social protection system, improving effectiveness and efficiency of social transfers and strengthening active inclusion policies.</p> <p>The Government has agreed 14 updated high-level goals for the period 2015-2017. They consist of reformulated and updated versions of high level goals from the existing NAP for Social Inclusion alongside new goals based on new and emerging issues that focus on early childhood development, youth exclusion, access to the</p>	The updated National Action Plan for Social Inclusion is relevant to actions defined within Priority 4 of both ROPs, which focus on supporting the shift towards a low-carbon economy. Specifically, goal 14 of the action plan discusses Affordable Energy, and the need to identify an appropriate energy poverty methodology to estimate and track	The continued focus of this action plan towards affordable energy emphasises the ongoing relevance of both the “ <i>Better Energy Warmer Homes Scheme</i> ” and the “ <i>Social Housing Retrofit Initiative</i> ” to the goals of the Irish Government toward social inclusion.	<p>Number of households with improved energy consumption classification.</p> <p>Greenhouse Gas (GHG) reduction (common output indicator).</p> <p>Increase the average thermal performance of households in the region.</p>

⁶⁹ <https://www.welfare.ie/en/downloads/Updated%20National%20Action%20Plan%20For%20Social%20Inclusion%202015-2017.pdf>

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
	labour market, migrant integration, social housing and affordable energy.	energy poverty levels. It also aims to reform existing efficiency programmes or develop new programmes as the best way of addressing energy poverty in the long term, as part of a new national affordable energy strategy.		
National Strategy for Women and Girls 2017-2020 ⁷⁰	The National Strategy for Women and Girls 2017-2020 was launched on May 2017 by the Department of Justice and Equality. The overarching aim of the Strategy is “An Ireland where all women enjoy equality with men and can achieve their full potential, while enjoying a safe and fulfilling life”. The Strategy contains 20 key objectives and over 200 planned actions which together aim to achieve this vision, grouped under three key themes: equalising socio-economic opportunity for women; ensuring the well-being of women; and engaging women as equal and active citizens.	This strategy is relevant to the commitments of both ROPs to strengthen research, technological development and innovation, and to support SME competitiveness. The strategy commits to enhancing the career progression for researchers and initiatives to improve the participation of women in research and innovation activities. Furthermore, the strategy commits to the promotion of female	Within Priority 1, the SFI supported schemes (SFI Research Centres, Spokes Programme, Investigators Programme) across both ROPs commit to an output of increasing the number of new researchers in supported entities. Similarly, although no measurable targets were defined, the National Strategy for Women and Girls in 2017-2020 highlight a commitment to enhancing career progression for researchers and initiatives currently in place to improve participation of women in research and innovation.	<p>Number of new researchers in supported entities</p> <p>Number of awards under the Spokes programme in the S&E region</p> <p>Employment increase in supported enterprises</p> <p>Number of participants of enterprise training programmes</p> <p>Increase in Employment in micro- enterprises in the S&E region</p>

⁷⁰ http://www.justice.ie/en/JELR/National_Strategy_for_Women_and_Girls_2017_-_2020.pdf/Files/National_Strategy_for_Women_and_Girls_2017_-_2020.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		entrepreneurship throughout the country.	Furthermore, within Priority 3, the “ <i>Entrepreneurship in Micro-Enterprise</i> ” scheme for both ROPs commits to supporting entrepreneurial activity and employment within this sector, which directly relate to this strategy’s goals of promoting female entrepreneurship as a topic of importance in policy decisions.	
Enterprise 2025 Renewed: Building Resilience in the face of global challenges ⁷¹	<p>This strategy was published in 2015 after the introduction of both ROPs and sets out the strategic framework for coherence across government departments in order to foster a better future and to deliver sustainable enterprise growth and jobs.</p> <p><i>Enterprise 2025 Renewed</i> sets out the path to long term sustainable growth, by achieving the following by 2020:</p> <ul style="list-style-type: none"> • at least 2.3 million people in employment; • an unemployment rate of no more than 5.5 percent while improving participation rates • realise the potential of regions so that unemployment is within 1 percentage point of the national average; • a 6-8 percent growth rate in indigenous exports to reach €26 billion, with greater geographic and market diversification; 	<p><i>Priority 3 – SME Competitiveness</i> aims to increase employment levels in micro-enterprises by supporting business start-ups, business expansion and higher innovation levels in micro-enterprise.</p> <p><i>Enterprise 2025 Renewed</i> has an emphasis on Irish owned enterprises and deepening the resilience in the enterprise base. It aims to deliver a change in the performance of Irish</p>	<p>Activities proposed in this strategy still hold relevance to the aims of the “<i>Entrepreneurship in Micro-Enterprise</i>” scheme within Priority 3 of this ROP. The strategy specifically relates to a commitment to continue to facilitate the creation of a comprehensive and competitive funding environment to support entrepreneurship and enterprises’ ambitions for growth. Further, the strategy also notes the “<i>Implement Spotlight on Skills</i>” programme, a regional SME</p>	<p>Employment increase in supported enterprises</p> <p>Number of business start-ups supported</p> <p>Number of enterprises receiving non-financial support</p> <p>Number of participants in enterprise training programmes.</p> <p>Number of enterprises receiving support</p> <p>Number of enterprises receiving grants</p>

⁷¹ <https://dbei.gov.ie/en/Publications/Publication-files/Enterprise-2025-Renewed.pdf>

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
	<ul style="list-style-type: none"> • Ireland as a Global Innovation Leader with 2.5 percent of Gross National Product (GNP) invested in Research, Development and Innovation; • expenditure in the Irish economy of €29 billion by agency supported enterprises; • rank in the top 5 most competitive small countries in the world, with a business environment that supports entrepreneurship, scaling of Irish owned enterprises and is attractive for the next wave of foreign direct investment (FDI). 	owned enterprises, through a programme of investment, innovation and capability development to enhance the business environment, thought the following activities:	help SMEs identify their skills needs. With a primary focus and output of this scheme being to increase the employment levels, any further support provided can only further facilitate reaching this goal.	Increase in Employment in micro- enterprises in the S&E Region
Innovation 2020⁷²	<i>Innovation 2020</i> is Ireland's current strategy for research and development, science and technology. Published in 2015, it is Ireland's whole of Government Strategy and is driven by the Department of Business, Enterprise and Innovation. The Strategy sets out Ireland's vision to be a Global Innovation Leader (GIL) by 2020 through a combination of prioritising public and private investment in Research, Development and Innovation (RDI), enhancing the impact of RDI for enterprise and addressing human capital challenges to deliver on the country's RDI ambitions.	Innovation 2020 is relevant to both Priority 1 (<i>Strengthening Research, Technological Development and Innovation for both ROPs</i>) and Priority 3 (<i>SME Competitiveness</i>) of both ROPs. The strategy notes that while the Foreign Direct Investment sector also has a keen interest in innovation, the SME sector faces a number of distinct challenges. Innovation 2020 aims to implement a Design Strategy that	Innovation 2020 specifically relates to a number of schemes that it continues to support, with the aim of strengthening research and innovation throughout both BMW and S&E regions: <ul style="list-style-type: none"> • <i>Science Foundation Ireland (SFI) Research Centre Programme</i> • <i>Marine Research Programme</i> • <i>Commercialisation Fund</i> • <i>Innovation Partnership Programme</i> 	Number of new researchers in supported entities Number of awards under the Spokes programme in the S&E region Increased number of industry partners engaged with funded strategic research centres in the S&E region.

⁷² <https://dbei.gov.ie/en/Publications/Publication-files/Innovation-2020.pdf>

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		encourages more start-ups and SMEs to use design as a competitive differentiator and to promote Ireland's creative economy		
Project Ireland 2040: National Development Plan ⁷³	<p>Project Ireland 2040 was launched in February 2018 and brings together an overarching National Planning Framework for Ireland up to 2040, alongside a ten-year capital investment programme of €116 billion. It aligns investment priorities with long-term economic, social and environmental objectives, including challenges arising from developments like Brexit.</p> <p>The National Development Plan sets out the investment priorities that will underpin the successful implementation of the new National Planning Framework (NPF). This will guide national, regional and local planning and investment decisions in Ireland.</p> <p>The National Development Plan (NDP) aims to provide regional level strategic planning and economic through the Regional Spatial and Economic Strategy (RSES).</p>	<p>The National Development Plan 2018—2027 is relevant to:</p> <p><i>Priority 1 (Strengthening Research, Technological Development and Innovation for both ROPs)</i>- The plan sets out its support for the continued development of research centres throughout the country.</p> <p><i>Priority 2 (ICT Infrastructure)</i>- The relevant activities from National Development Plan 2018—2027 focus on the delivery of access to high speed affordable broadband to every home and business in Ireland,</p>	<p>The National Development Plan of Project Ireland 2040 relates to the majority of priority levels defined in both ROPs. Therefore, a broad level of support is provided for all schemes that are within each priority.</p>	<p>Number of new researchers in supported entities</p> <p>Number of awards under the Spokes programme in the S&E region</p> <p>Increased number of industry partners engaged with funded strategic research centres in the S&E region</p> <p>Number of households with improved energy consumption classification.</p> <p>Greenhouse Gas (GHG) Reduction (common output indicator).</p> <p>Increase the average thermal performance of</p>

⁷³ https://www.gov.ie/pdf/?file=https://s3-eu-west-1.amazonaws.com/govieassets/831/130718120306-5569359-NDP%20strategy%202018-2027_WEB.pdf#page=

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		<p>achieved through a combination of accelerated commercial investment and a state intervention in those parts of the country where there is no certainty that the private sector will invest. Furthermore, it aims to support greater remote working, broaden citizens choices in where to live and allow SME's to grow their businesses in rural and urban areas.</p> <p><i>Priority 4 (Shift Towards a Low-Carbon Economy)</i>- The delivery of the plan's investment priorities represents a change in Ireland's performance in relation to climate-action objectives delivering a significant reduction in carbon emissions for 2030 as compared to the baseline 'no policy change' position.</p> <p><i>Priority 5 (Sustainable Urban Development)</i> for</p>		households in the region.

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
		both the BMW, and S&E ROPs. The plan notes the allocation of €2billion for an Urban Regeneration and Development Fund to promote co-ordinated investment in the renewal and redevelopment of the nation's cities and towns.		
European Research Area Progress Report 2016 ⁷⁴	The last European Research Area (ERA) Progress Report was issued in 2014. The present report summarises the state of play of ERA and the progress on the implementation of ERA over the period 2014-2016. The <i>ERA Progress Report 2016</i> was developed in cooperation with Member States, Associated Countries and research stakeholders. Ireland's performance towards achieving the ERA is ahead of the EU-28 average.	The European Research Area (ERA) Progress Report is relevant to Priority 1 (Strengthening Research, Technological Development and Innovation) for both the BMW and S&E ROPs. The progress report details how "Innovation 2020", (launched December 2015), delivers a more effective national research system for Ireland	The report outlines the importance of innovation centres as important tools to ensure the circulation of knowledge. Although not directly contributing to specific schemes within either ROP, the report supports the continued operation and impact of innovation centres, highlighting the continued importance of the <i>SFI Research Centres</i> scheme in facilitating the strengthening of research and development of innovation	Number of new researchers in supported entities Number of awards under the Spokes programme in the S&E region Increased number of industry partners engaged with funded strategic research centres in the S&E region.

⁷⁴ http://ec.europa.eu/research/era/pdf/era_progress_report2016/era_progress_report_2016_com.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
			across both BMW and S&E areas.	
Ireland's National Skills Strategy 2025⁷⁵	<p>This new National Skills Strategy 2025 aims to underpin Ireland's growth as an economy and as a society over the coming years. Through the vision, actions and targets set out, the Strategy will support development of a well-educated, well-skilled and adaptable labour force, creating and sustaining a strong pool of talented people of all ages living in Ireland.</p> <p>There will be an increased demand for research personnel within the enterprise sector rising from 20,000 currently to 40,000 by 2020. These researchers are expected to be across all skill levels, from technicians through to PhD level research leaders. Actions include:</p> <ul style="list-style-type: none"> • Increase enrolments of postgraduate researchers to address demand in the economy • Address gaps in the funding system for postdoctoral researcher through competitive support for excellent research across all disciplines • Establish improved system-wide tracking of researcher mobility into industry 	<p>The labour market is constantly evolving, and the specific occupations, skills and qualifications that are required change over time maintain employment and for enterprises.</p> <p>Ireland's National Skills Strategy 2025 is relevant to:</p> <p>Priority 1 (Strengthening Research, Technological Development and Innovation for both ROPs) - The plan sets out its support for the continued development of research centres throughout the country.</p>	<p>Ireland's National Skills Strategy 2025 specifically relates to a number of schemes, with the aim of strengthening research and innovation throughout both BMW and S&E regions:</p> <ul style="list-style-type: none"> • <i>Science Foundation Ireland (SFI) Research Centre Programme</i> • <i>Marine Research Programme</i> • <i>Commercialisation Fund</i> • <i>Innovation Partnership Programme</i> 	<p>Number of new researchers in supported entities</p> <p>Number of awards under the Spokes programme in the S&E region</p> <p>Increased number of industry partners engaged with funded strategic research centres in the S&E region.</p>
Ireland's Transition to a Low Carbon	The White Paper: Ireland's Transition to a Low Carbon Energy Future 2015 – 2030, outlines the future of energy deployment within the country. It	Priority 4 (Shift Towards a Low-Carbon Economy)- The delivery	Within Priority 4- The social housing retrofit scheme refers to committed	Number of households with improved energy

⁷⁵ https://www.education.ie/en/Publications/Policy-Reports/pub_national_skills_strategy_2025.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
Energy Future 2015 - 2030 ⁷⁶	<p>focuses on renewable energy whilst referring to the strategic importance of its fossil fuel resources during the transition.</p> <p>Non-renewables currently account for over 90% of energy consumption in Ireland. This will need to fall to 84% in 2020 if Ireland is to reach its binding EU targets for renewables.</p> <p>The domestic sector comprises 1.7 million homes and is the third largest emitter of energy-related GHG emissions. The white paper aims to stimulating a significant step-change in domestic energy efficiency, including by empowering consumers to better manage their energy consumption, to reduce emissions, cut energy bills, enhance health and wellbeing, and help older people to live independently.</p>	<p>of the plan’s investment priorities represents a change in Ireland’s performance in relation to climate-action objectives delivering a significant reduction in carbon emissions for 2030 as compared to the baseline ‘no policy change’ position.</p> <p>SEAI have identified the potential for post 2020 energy savings of up to 9,400 GWh in the residential sector. Achieving these savings will require householders to “deep retrofit” their homes.</p>	<p>measures that aim to retrofit vacant social housing stock that will return them to productive use in the regions. The commitment to improve the number of additional social housing units in this plan therefore complement those set out within this scheme.</p>	<p>consumption classification.</p> <p>Greenhouse Gas (GHG) Reduction (common output indicator).</p> <p>Increase the average thermal performance of households in the region.</p>
Southern Regional Assembly Regional Spatial and Economic Strategy (2018) ⁷⁷	<p>The RSES will enable the implementation of the NPF at regional and local levels, to ensure that future growth and development patterns will meet the needs of the regions.</p> <p>The purpose of the Regional Spatial and Economic Strategy (RSES) is to support the implementation of the emerging National Planning Framework.</p>	<p>Recent developments to Southern Regional Assembly Regional Spatial and Economic Strategy hold relevance to a number of priorities in the S&E region:</p>	<p>The RSES relates to the majority of priority levels defined in both ROPs. Therefore, a broad level of support is provided for all schemes that are within each priority.</p>	<p>Number of integrated growth centre strategies.</p> <p>Population living in areas with integrated urban development strategies</p>

⁷⁶ <https://www.dccae.gov.ie/documents/Energy%20White%20Paper%20-%20Dec%202015.pdf>

⁷⁷ https://www.corkcoco.ie/sites/default/files/2017-11/SRA_Issues_Paper.pdf

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
	<p>Since 1st January 2015, three Regional Assemblies have been tasked with specific functions regarding spatial planning and economic development as well as EU funding programmes, oversight of local authority performance and Local Economic and Community Plans, and implementation of national policy.</p> <p>The Southern Region consists of the administrative areas of Carlow, Cork, Clare, Kerry, Kilkenny, Tipperary and Wexford County Councils, Limerick City and County Council, Waterford City and County Council and Cork City Council. The region covers about 42% of the total land area of the country and had a total population of almost 1.6 million people at the time of the 2016 census.</p> <p>The economic elements will focus on:</p> <ul style="list-style-type: none"> • Creating and sustaining quality jobs • Identifying regional strengths and opportunities • Identifying the regional attributes that are essential to enhancing regional economic performance <p>The spatial strategy will also address the location and provision of:</p> <ul style="list-style-type: none"> • Employment, industrial and commercial development 	<p><i>Priority 2- ICT Infrastructure</i></p> <p><i>Priority 3- SME Competitiveness</i></p> <p><i>Priority 4 (Shift Towards a Low-Carbon Economy)</i></p> <p><i>Priority 5 (Sustainable Urban Development)</i></p> <p>In summary, the commitments defined within RSES continue to align with the priorities presented in the ROP.</p>		<p>Number of multimodal urban mobility projects implemented</p> <p>Improvements in the social, economic and physical conditions in selected urban centres based on an urban development index.</p> <p>Non-private car commuting levels in the designated urban centres.</p>

Strategy	Recent Developments	Issues affecting the Programme or Priorities	Priority Specific Issues-Schemes	Performance indicator
	<ul style="list-style-type: none"> • Retail development • Housing <p>Transportation, including public transportation, water services, energy and communications networks, waste management facilities</p>			

3. APPENDIX 1C: REVIEW OF EXTERNAL DEVELOPMENTS – ASSESSMENT OF CONTINUED RELEVANCE OF INTERVENTION LOGIC

3.1 Approach

The Intervention Logic in the OP needs to address the Commission's requirements⁷⁸ & ⁷⁹. These are set out as covering the following 6 stages of work:

- **Stage 1:** Identification of development needs and funding priorities.
- **Stage 2:** Selection of thematic objective and investment priorities.⁸⁰ (Priorities 1-5 in the S&E ROP 2014-20)
- **Stage 3:** Establishment of specific objectives: These need to be linked closely to the development needs from stage 1. Specific objectives are required by the Commission to 'reflect the change, including the direction of the change, which the MS seeks to achieve with the EU support. This change needs to be as specific as possible so that the intervention to be supported can contribute to the change and this impact can be evaluated.
- **Stage 4:** Definition of Result Indicators: These are linked to the specific objectives and therefore can only be developed when the previous stages are fully completed.
- **Stage 5:** Types of Actions to be supported: The most effective actions must be proposed and choosing these requires an analysis of the problems which underpin the situation (and should be included in the stage 1 assessment). The actions must focus on the factors they plan to affect. Any external factors which could influence the intended results should be identified.
- **Stage 6:** Definition of output indicators.

Each of the six stages above represents a distinct step in the intervention logic of the programme, however for intervention logic to be effective, it is essential that it creates logical links between all of the stages. The intervention logic outlined in the operational programme for each thematic objective/investment priority should be driven by the specific objectives established based on the analysis of development needs and by the expected results⁸¹. To assist understanding of this, the questions below describe what we must answer at each of the 6 stages to fully assess the logical links between the stages. We are looking to ensure that each element of the Intervention Logic as developed in the Ex-Ante Evaluation continues to satisfy the requirements above. Our assessment of Stages 1 to 6 is included in this document.

In addition to ensuring that each element of the Intervention Logic continues to satisfy the requirements above, we also consider the links within the logic chain. The actions should be linked to the expected outputs and expected results and the links between the actions and these should be detailed. This involves considering the logic (IF INPUT X... THEN OUTPUT Y will be delivered) that is assumed will underpin the intervention and also considers cause-effect and uncertainty. Key questions we consider include:

- What assumptions have been made about **cause and effect** and are these assumptions still appropriate?
- Do the actions supported continue to contribute to the achievement of output indicators identified?
- Have the expected outputs contributed to the achievement of results?
- Have the expected results contributed to the achievement of the specific objective and addressed the development need identified?

⁷⁸ European Commission Position Paper – Guidance Fiche – Intervention Logic Version 1 06/05/2013

⁷⁹ European Commission Guidance Document on Monitoring and Evaluation – European Regional Development Fund and Cohesion Fund- Concepts and Recommendations – March 2014

⁸⁰ Article 9 of the CPR lists 11 Thematic Objectives which ESI funds shall support; Article 5 of the ERDF Regulation identifies investment priorities within the Thematic Objectives that the ERDF shall support.

⁸¹ European Commission Position Paper – Guidance Fiche – Intervention Logic Version 1 06/05/2013

We have reviewed the information provided by S&E on the intervention logic for each of the Investment Priorities under each of the Thematic Objectives. We reviewed this content against the six stages of work required by the Commission (see above) and also take into account cause-effect and uncertainty within the logic chain.

3.2 Priority 1: RTDI

3.2.1 Development Needs

The table below shows the development needs highlighted in the ROP for Priority 1 of the S&E ROP.

Development Needs
<ul style="list-style-type: none">• Ireland's RIS3, through the National Research Prioritisation Exercise, has identified 14 strategic areas of opportunity where public investment in research should be aligned. Considerable investment will be necessary to realise this potential. The majority of HEI's are based in the S&E Region.• BERD expenditures are below the OECD average.• The S&E region ranked 90th out of all EU regions reporting data on GERD, with a per capita spend of €657 on R&D.• Capacity of higher education institutes in S&E Region to access R&D Funding is below the OECD average.• Weak academic-industrial linkages and sub-optimal commercialisation of research. EPO Patent applications below the EU average. Patents per billion of GDP in Ireland stands at 2.63 compared to the EU average of 4.0.

The Evaluators believe that the development needs identified for this priority are grounded in the socio-economic needs for the programme area and remain relevant to the policy and operating context.

3.2.2 Investment Priority 1(a)

Investment Priority 1 (a)
1 (a) Enhancing research and innovation (R&I) infrastructure and capacities to develop R&I excellence, and promoting centres of competence, in particular those of European interest

Whilst the total gross expenditure on R&D increased from €2,870m to €3,243m between 2013 and 2016, the proportion of national GDP invested in R&D was still below the target of 2% (1.5%). Therefore, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)
To increase the level of research taking place in the S&E region with Company engagement by supplying applied research

The socio-economic review has found that the number of firms and the number of research staff involved in R&D have increased significantly, however, the total gross expenditure could be improved. The Evaluator's assessment is that this Specific Objective remains appropriate.

Result Indicators

Result indicators:

Increased number of Industry partners engaged with funded strategic research centres in the S&E Region (Target = 713)

Result indicators for the programme need to be specific and measurable. The Evaluator's assessment is that the Result Indicators remain appropriate.

Type of Actions

Type of actions:

- Strategic research centres in the S&E institutions (Science Foundation Ireland)
- SFI Spokes Programme
- SFI Research Professors
- Marine research programmes in the S&E Region (Marine Institute)

The Evaluator's assessment is that the Actions detailed within the ROP are appropriate, consistent with and adequately reflect the intentions under the development needs, the Investment Priority, Specific Objective and proposed result indicators for this element of the programme.

Expected Outputs

Expected Outputs:

Common Output Indicators⁸²

- *Number of new researchers in supported entities*

Programme Specific Output Indicators:

- Number of Awards under the Spokes Programme in the S&E Region (Target=25)
- Number of marine research PhDs and Post-Doctoral researchers funded (Target=21)

The Evaluator's assessment is that the outputs continue to be sufficient in detailing the expected outputs of the intervention under this Investment Priority.

⁸² Full list of Common Output Indicators included in ANNEX I of the REGULATION (EU) No 1301/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 17 December 2013 on the European Regional Development Fund and on specific provisions concerning the Investment for growth and jobs goal and repealing Regulation (EC) No 1080/2006

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
Actions as listed above	<p>Cause-Effect:</p> <p>Targeted investment:</p> <ul style="list-style-type: none"> - to increase the numbers of researchers in order to build R&D capacity and excellence within supported entities, and so promoting centres of competence. - to increase and enhance the R&D infrastructure (build new and improve existing) within the S&E region in line with national research priorities. - Increased and improved level of infrastructure will also accommodate intended increased numbers of researchers. - to support marine research programmes while growing the capacity of the region to undertake marine research in alignment with national and EU marine research objectives. <p>Institutions will receive specific investment to increase their research workforce base and improve their existing research infrastructure (specific attention to be paid to marine based research).</p>	Common and Programme Specific outputs listed in Table above	<p>Cause-Effect:</p> <ul style="list-style-type: none"> - Improving the research infrastructure and number of researchers will increase the level of research being carried out within these Institutions i.e. build research capacity of institutions and the level of research output - Improving the research infrastructure and number of researchers will enable them to target research toward areas of European interest. - Investment provided to the Marine Institute will support marine research programmes and will grow the capacity of the region to undertake marine research. <p>Uncertainty</p> <ul style="list-style-type: none"> • Will an increased research capacity necessarily translate into an increased research performance of these institutes? • Will benefits be passed to programme region or remain in third level institutions; • Is this the best method to improve research infrastructure in the programme region; 	Result Indicators listed above

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
	<p>This increased level of infrastructure will accommodate intended increased numbers of researchers and increase the number of research projects (including marine based research).</p> <p>Uncertainty</p> <ul style="list-style-type: none"> • Will institutions be able to attract and recruit the required numbers of researchers to utilise the increased level of infrastructure? • Will an increased research capacity necessarily translate into an increased research performance of these institutes? • There is no guarantee that increased support for strategic research will increase the levels of employment. • Will there be a displacement of research? • What is the risk of investment not being completed? • Will institutions be able to attract the required talent, to build centres of competence, and in the numbers required to fully avail of the increased capacity afforded through new infrastructure? 		<ul style="list-style-type: none"> • Will these research positions be sustainable beyond the funding period? • Do research areas of European interest align with areas which would currently be of national interest or greatest regional benefit? 	

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
	<ul style="list-style-type: none"> Will the investment cover the required cost for new and specialised research infrastructure? 			

The Evaluator’s assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.2.3 Investment Priority 1(b)

Investment Priority 1(b)
<i>1 (b) Promoting business investment in R&I, developing links and synergies between enterprises, research and development centres and the higher education sector, in particular promoting investment in product and service development, technology transfer, social innovation, eco-innovation, public service applications, demand stimulation, networking, clusters and open innovation through smart specialisation, and supporting technological and applied research, pilot lines, early product validation actions, advanced manufacturing capabilities and first production, in particular in key enabling technologies and diffusion of general purpose technologies</i>

Whilst the total gross expenditure on R&D increased from €2,870m to €3,243m between 2013 and 2016, the proportion of national GDP invested in R&D was still below the target of 2% (1.5%). Therefore, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)
To increase the level of commercialisation of research by the higher education institutions in the S&E Region

The socio-economic review has found that the number of firms and the number of research staff involved in R&D have increased significantly, however, the total gross expenditure could be improved. The Evaluator's assessment is that this Specific Objective remains appropriate.

Result Indicators

Result indicators:
Annual Number of Licenses as a result of research in S&E Region (Target=25, Baseline=24)

Result indicators for the programme need to be specific and measurable. The Evaluator's assessment is that the Result Indicator remain appropriate.

Types of Actions

Type of actions:
<ul style="list-style-type: none">• Commercialisation Fund (Enterprise Ireland)• Innovation Partnerships (Enterprise Ireland)

The Evaluator's assessment is that the Actions are consistent with the Result Indicator and reflect the development needs (and IP, SO). The Disruptive Technologies Innovation Fund, introduced in July 2018, includes €500 million available for co-funded projects involving enterprises and research partners. However, the niche nature of the fund (i.e. supporting "disruptive" technology) the vast majority of research activity that is currently supported by the ROP-funded projects would not fall within this category. Therefore, potential duplication is limited. Given the level of investment required to reach the target of 2% of GDP spent on R&D and the growing appetite expressed by businesses, it is likely that these schemes / funds will complement each other.

Expected Outputs

Expected Outputs:
Common Output Indicators⁸³
<ul style="list-style-type: none">• Productive investment: Number of enterprises receiving support (Target=143).• Productive investment: Number of enterprises receiving nonfinancial support (Target=143)• Research, Innovation: Number of enterprises cooperating with research institutions (Target=143)
Programme Specific Output Indicators:
<ul style="list-style-type: none">• Number of Commercialisation Fund Awards (Target = 325)

The Evaluator's assessment is that the outputs continue to be sufficient in detailing the expected outputs of the intervention under this Investment Priority.

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
<p>Actions as listed above</p>	<p>Cause-Effect:</p> <p>Targeted investment</p> <ul style="list-style-type: none"> To increase the level of cooperation in R&D between enterprise and institutions in the region in order to increase the capacity for commercialisation of R&D. Create partnerships between enterprises and institutions to improve competitiveness of the enterprises while creating a source of income to finance further research activities. <p>Institutions and enterprises will receive finance and support to form partnerships with a view to commercialising research outputs.</p> <p>Uncertainty:</p> <ul style="list-style-type: none"> What is the risk of failure of partnership enterprises? Is there a risk research outputs may not be suited for commercialisation? Will commercialised outputs be sufficiently profitable? Will support provided be enough to overcome the stated funding shortfalls inhibiting partnerships. To what extent can the programme overcome the culture within HEIs in the region whereby little focus 	<p>Common and Programme Specific outputs listed in Table above</p>	<p>Cause-Effect:</p> <p>Analysis to be completed once results (i.e. outputs arising) are confirmed</p> <ul style="list-style-type: none"> Increasing level of collaboration will increase the commercialisation of research across the region as a whole. <p>Uncertainty</p> <ul style="list-style-type: none"> Will support provided be enough to overcome the stated funding shortfalls inhibiting partnerships? To what extent can the programme overcome the culture within HEIs in the region whereby little focus is paid to knowledge transfer linkages? Will partnerships be created outside of support provided by the Operational Programme? Will external factors, e.g. regional infrastructure, have a negative effect on any competitive advantages to be gained through research/enterprise partnerships? 	<p>Result Indicators listed above</p>

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
	<i>is paid to knowledge transfer linkages?</i>			

The Evaluator’s assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.3 Priority 2: ICT Infrastructure

3.3.1 Development Needs

The table below shows the development needs highlighted in the ROP and Intervention Logic Tables for Priority 2 of the S&E ROP

Development Needs
<ul style="list-style-type: none"> From a regional and rural perspective, there are extensive areas in both regions that will require publicly funded investment in order to ensure that they will be provided with high-speed next generation broadband infrastructure, if both the national and EU targets are to be achieved.
<ul style="list-style-type: none"> Ireland performs poorly (24.4%) compared with the OECD average (27%) in terms of fixed broadband penetration. Fibre accounts for only 0.5% of connections compared with 9.6% for the OECD
<ul style="list-style-type: none"> High reliance on mobile broadband with limited speed and capacity. 47% are mobile subscriptions compared with 41.6% OECD average
<ul style="list-style-type: none"> Poor connection speeds available, especially in rural areas. Approximately 56.7% of all broadband subscriptions were equal to or greater than 10Mbps.

The Evaluators believe that the development needs identified for this priority are grounded in the socio-economic needs for the programme area and remain relevant to the policy and operating context.

3.3.2 Investment Priority 2 (a)

Investment Priority 2(a)
<ul style="list-style-type: none"> 2 (a) extending broadband deployment and the roll-out of high-speed networks and supporting the adoption of emerging technologies and networks for the digital economy

The evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)
<ul style="list-style-type: none"> To increase the provision of fibre optic links to all un-served towns and villages in the S&E Region

The evaluators believe that this specific objective is appropriate and links logically back to the Development Needs and chosen Investment Priority.

Result Indicators

Result indicators:
<ul style="list-style-type: none"> Extension of next generation broadband to 933 settlements in the S&E Region (baseline = 391)

Result indicators for the programme need to be specific and measurable. The Evaluator's assessment is that the Result Indicators remain appropriate.

Type of Actions

Type of actions:
<ul style="list-style-type: none"> • <i>Comprehensive consultation and mapping exercise (milestone)</i> • <i>Scoping of target areas for intervention (milestone)</i> • <i>State Aids Application (milestone)</i> • <i>Public Procurement Process (milestone)</i> • <i>Major Project Application (milestone)</i> • <i>Installation of fibre cable network to enable connections to all un-served settlements</i>

The Evaluator's assessment is that the Actions are consistent with the Result Indicator and reflect the development needs (also IP and SO).

Expected Outputs

Expected Outputs:
Common Output Indicators ⁸⁴
<ul style="list-style-type: none"> • <i>Number of households enabled for high speed (>30mbps) broadband connections (target = 164,344)</i>
Programme Specific Output Indicators:
<ul style="list-style-type: none"> • <i>None</i>

There are no Programme Specific Output Indicators developed as part of Priority 2. Alternative Programme Specific Output Indicators that could be also be considered include:

- **Population in areas enabled for high speed (>30mbps) broadband connections; and**
- **Number of enterprises with access to next generation broadband services as a result of ERDF support.**

However, the evaluators are content that the Common Indicator chosen comprehensively measures what the programme aims to achieve through this priority and, as such including additional indicators are not necessary.

⁸⁴ Full list of Common Output Indicators included in ANNEX I of the REGULATION (EU) No 1301/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 17 December 2013 on the European Regional Development Fund and on specific provisions concerning the Investment for growth and jobs goal and repealing Regulation (EC) No 1080/2006

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
Actions as listed above	<p>Cause-Effect:</p> <p>The targeted investment through the programme will enable an extended roll out of high speed next generation broadband networks to areas that would not have been provided for otherwise.</p> <p>Strong cause-effect, actions to enhance broadband infrastructure will enhance availability of high speed broadband.</p> <p>Uncertainty:</p> <ul style="list-style-type: none"> • <i>Prohibitive pricing of connection to network will be prohibitive to the uptake of new broadband services by households. Especially in event of the availability of only one Internet Service Provider in the region.</i> • <i>Low population densities in rural areas discouraging private sector intervention</i> 	Common and Programme Specific outputs listed in Table above	<p>Cause-Effect:</p> <p>The outputs achieved through the programme will enable enhance availability to broadband services within the region.</p> <p>Strong cause-effect the connection of areas to next generation high speed broadband services will potentially see an uptake of these services by households in the area.</p> <p>Uncertainty</p> <ul style="list-style-type: none"> • <i>Lack of pre-existing underground infrastructure to facilitate rollout to particular areas owing to prohibitive cost of creation of underground infrastructure.</i> • <i>Low level of computer skills within region will still present a barrier to uptake</i> 	Result Indicators listed above

The Evaluator's assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.4 Priority 3: SME Competitiveness

3.4.1 Development Needs

The table below shows the development needs highlighted for Priority 3 of the S&E ROP (statistics updated where possible).

Development Needs
<i>Decline in the number of economically active SMEs, with enterprise deaths exceeding enterprise births in recent years.</i>
<i>Total early-stage entrepreneurial activity rate is 4.8% in Ireland compared with an EU rate of 7.2%. The rate is 9.5% for males and 3.9% for females</i>
<i>Difficulties for SMEs and start-ups to access finance as a result of the prevailing economic and banking climate. Only 52.2% of SME loans are approved</i>
<i>Weak domestic and consumer demand, leaving many firms and employees vulnerable - over 56% of private sector workers employed by non-exporting indigenous firms (Needs Analysis)</i>

There has been significant improvement in economic conditions since the start of the programme which has impacted SME competitiveness. At the start of the programme, growth of the SME business base was hindered by low levels of entrepreneurialism, financial barriers to start-up, and weak domestic demand/ low levels of exporting. Since 2015 however, levels of entrepreneurialism have increased to above the EU average and there has been an increase in the SME business base due to a rise in the business birth rate.

The Enterprise 2025 Renewed strategy which has published after the ROP had been agreed, noted the on-going need to support SME start-up, but also to facilitate growth and resilience, particularly amongst Irish owned businesses, through investment, innovation (see Priority 2) and capability development.

Analysis of socio-economic needs suggests that although progress has been made in terms of SME start-up and entrepreneurialism, employment in SMEs has only risen marginally, and the turnover and GVA accounted for by the SME base in Ireland has decreased. Although there remains a policy and economic rationale for continuing to provide start up and development support to SMEs, consideration may need to be given to whether the remainder of the programme should place greater emphasis on growth and job creation agendas given the socio-economic trends outlined above and the publication of the Action Plan for Jobs in 2018.

Consultations with delivery partners recognise that while there remains a need for pre-start up support and interventions to encourage and de-risk entrepreneurial activity, in order to deliver jobs growth and resilient businesses, sufficient attention also needs to be given to the quality of new starts and ensuring their longer-term sustainability and growth.

The Evaluators believe that the development needs identified for this priority are grounded in the socio-economic needs for the programme area and remain relevant to the policy and operating context. However, given changes in socio-economic trends since 2015, consideration could be given to placing greater focus on supporting SME sustainability / resilience and jobs growth over the remainder of the programme.

3.4.2 Investment Priority 3(a)

Investment Priority 3(a)
<i>3 (a) promoting entrepreneurship, in particular by facilitating the economic exploitation of new ideas and fostering the creation of new firms, including through business incubators</i>

Given improvements in entrepreneurialism since 2015, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objective

Specific Objective(s)
<i>To increase employment levels in micro-enterprises in the S&E Region by supporting business start-ups, business expansion and higher innovation levels in micro-enterprises.</i>

The evaluators believe that this specific objective is appropriate and links logically back to the Development Needs and chosen Investment Priority. Given the decline in SME turnover and GVA since 2015, it is recommended that the specific objective is expanded to consider competitiveness improvements as well as employment growth.

Result Indicators

Result indicators:
<i>Employment increase in micro enterprises (Target=186,852. Baseline=169,866).</i>

The evaluator considers the result indicator to be appropriate given socio-economic needs. Consideration could be given to capturing information on Improvement in SME turnover per Head/FTE in the Region is included to demonstrate improvements in SME competitiveness and productivity.

Types of Actions

Type of actions:
<ul style="list-style-type: none"><i>Promote local enterprise culture and entrepreneurship through initiatives such as 'Start Your own Business' courses, Women-in-Business schemes, schools enterprise programmes etc.</i><i>Support business start-ups and expansions with appropriate financial supports</i><i>Encourage and facilitate higher levels of value added businesses by applying innovation, ICT strategies and export awareness</i><i>Build the capability of owner-managers of micro-businesses through training and development actions including mentoring, peer learning, and access to business networks</i><i>Provide support to Enterprise Ireland's entrepreneurship, training and business accelerator programmes</i><i>Enterprise Ireland Feasibility and Training Programmes</i>

In order to provide a clear link between priority objectives and expected outputs, it is recommended that employment and GVA growth is more explicitly referenced within indicative actions

Expected Outputs

Expected Outputs:
Common Output Indicators ⁸⁵ :
<ul style="list-style-type: none">• <i>Number of enterprises receiving support (Target=51,736)</i>• <i>Number of enterprises receiving grants (Target=1,804)</i>• <i>Number of enterprises receiving non-financial support (Target=17,770)</i>• <i>Number of new enterprises supported (Target=2,398)</i>• <i>Private Investment matching public support to enterprises (Target=€13,649,599).</i>• <i>Employment increase in supported enterprises (Target=5,760)</i>
Programme Specific Output Indicators:
<ul style="list-style-type: none">• <i>Number of participants of enterprise training programmes (Target=105,522)</i>

The Evaluators are content that the indicators chosen (both Common and Programme Specific) remain relevant and comprehensively measure what the programme aims to achieve through this priority and as such including additional Common Indicators is not necessary.

Target values are based on previous programmes and also take cognisance of the economic context. EI stakeholder consultations have not suggested they should be changed.

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
Actions as listed above	<p>Cause-Effect:</p> <p>There is a robust cause-effect between the actions and their intended results.</p> <p>An increase in provision of financial and training supports will result in an increase in the number of businesses receiving Financial and non-financial support for enterprises in the programme region. This is a reasonable cause-effect.</p> <p>Additionally, Initiatives focusing on entrepreneurship = will increase the number of participants taking part in such programmes. This is a reasonable cause-effect</p> <p>Uncertainty:</p> <ul style="list-style-type: none"> ○ <i>Will finance be utilised in the most effective manner?</i> ○ <i>Will level of finance be appropriate?</i> ○ <i>Will support delivered be relevant to specific sectors?</i> ○ <i>Will training be relevant to all potential start-up sectors?</i> 	Common and Programme Specific outputs listed in Table above	<p>Cause-Effect:</p> <p>Increasing support provided to start-ups and existing businesses within the S&E region will result in a cross regional increase in the levels of new enterprise, with a positive impact on employment levels within the region.</p> <p>This is a weak cause effect as it is based on the assumption that factors relating to access to finance and training are the sole limiting factors to the rate of start-ups within the region and that as such an increase in the provision of these factors will result in an increased rate of rate of business expansion and enterprise start-ups.</p> <p>The cause-effect assumes that increasing the number and level of start-ups will result in an increased level of employment within the region also.</p> <p>Uncertainty:</p>	Result Indicators listed above

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
	<ul style="list-style-type: none"> ○ <i>What percentage of start-ups will reach stage of expansion where it will be required to employ?</i> ○ <i>What is the counterfactual position?</i> ○ <i>Will it result in an actual increase in enterprise levels?</i> 		<ul style="list-style-type: none"> ○ <i>Will the benefits of support be passed to the programme region?</i> ○ <i>Will there be a displacement effect on existing entrepreneurs?</i> ○ <i>Are there other factors restricting new enterprise in the region the programme has not taken into account?</i> ○ <i>Is level of support appropriate?</i> ○ <i>Will resulting start-ups be sustainable and robust in their business models?</i> ○ <i>What is the counterfactual position?</i> 	

The Evaluator’s assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.5 Priority 4: Energy Efficiency

3.5.1 Development Needs

The table below shows the development needs highlighted for Priority 4 of the S&E ROP (statistics updated where possible).

Development Needs
<ul style="list-style-type: none">• <i>Ireland aims to achieve a 20% reduction in overall energy demand. This requires targeted energy efficiency measures</i>
<ul style="list-style-type: none">• <i>Ireland's GHG emissions are 50% above the EU average at 13.8t of CO2 per capita</i>
<ul style="list-style-type: none">• <i>Poor energy performance of the building stock, including social housing. 79% of pre-1977 dwelling have BER of 'D' or worse in Ireland. This clearly demonstrates that age of dwellings is the most important determinant of energy performance of domestic dwellings.</i>
<ul style="list-style-type: none">• <i>Current average energy performance of housing units is 210kWh per BRm2</i>

A White Paper introduced in 2015⁸⁶ as an energy policy update underpins the necessity and direction of the Priority / schemes in that the paper acknowledges that improved energy efficiency and renewable energy play vital roles in reducing carbon emissions. The White Paper proposes to deliver enough energy efficiency upgrades by 2030 to ensure that the residential sector is on a realistic trajectory to a low carbon future. This aligns with the intent and direction of the OP / Priority / Schemes.

The Evaluators believe that the development needs identified for this priority are grounded in the socio-economic needs for the programme area and remain relevant to the policy and operating context.

3.5.2 Investment Priority 4 (c)

Investment Priority 4(c)
<i>4 (c) supporting energy efficiency, smart energy management and renewable energy use in public infrastructures, including in public buildings, and in the housing sector;</i>

The socio-economic review found that the percentage of total emissions accounted for by transport had seen a small increase of 4.2%, from 11.347 million tonnes of CO2 to 11.827 million tonnes of CO2 in 2015. Therefore, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)
<i>To improve energy efficiency in the housing stock in S&E Region</i>

⁸⁶ White Paper: Ireland's Transition to a Low Carbon Energy Future 2015 to 2030 (DCCAE).

The Evaluator's assessment is that this Specific Objective remains appropriate.

Result Indicators

Result indicators:
<i>To reduce the average energy consumption of Irish households to 185 KWh per m2</i>

Result indicators for the programme need to be specific and measurable. The Evaluator's assessment is that the Result Indicator remains appropriate, subject to clarity in terms of data sources, baseline and target value.

Type of Actions

Type of actions:
<ul style="list-style-type: none"><i>A retrofit scheme to be delivered by local authorities in respect of social housing units in the S&E Region.</i><i>The Better Energy Warmer Homes scheme (BEWH), administered by the Sustainable Energy Authority of Ireland (SEAI), funding energy efficiency improvements in the homes of the elderly and vulnerable, making the homes more comfortable, healthier and more cost effective to run</i>

The IB reported that there has been a 'widening' of the socio-economic beneficiary groupings that are eligible for the scheme to include recipients of a wider range of social benefits including e.g. those in receipt of carer's allowances, domiciliary payments, job seekers allowance (for those unemployed for more than 6 months), one-parent families. The IB highlighted that this is a change that reflects socio-economic needs.

The Evaluator's assessment is that the Actions are consistent with the Result Indicator and reflect the development needs (also IP and SO).

Expected Outputs

Expected Outputs:
Common Output Indicators
<ul style="list-style-type: none"><i>Number of households with improved energy consumption classification (Target=19,497)</i>
Programme Specific Output Indicators:
<ul style="list-style-type: none"><i>Estimated annual decrease of GHG (Target=8,945)</i>

The Evaluators are content that the output indicators for the priority (both Common and Programme Specific) remain relevant and comprehensively measure what the programme aims to achieve through this priority. The output is considered to be appropriate and consistent with the stated Development Need and the Investment Priority.

Target values are based on previous programmes and also take cognisance of the economic context and updated policy developments.

Consultation with the IB reported that there has been a move away from a high volume of interventions (household numbers) towards implementing 'deeper measures' of more comprehensive packages of intervention / works for a more effective output, per household.

Consultation with the IB reported that there may be merit in considering an additional or alternative indicator for the Better Energy Warmer Homes scheme (and potentially also the Social Housing Retrofit scheme) i.e. to measure the energy efficiency improvement that is achieved through the intervention rather than solely a reading of the energy efficiency of the household post-works.

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
<p>Actions as listed above</p>	<p>Cause Effect</p> <p>There is a robust cause-effect relationship between the action and the outputs.</p> <p>Retrofit scheme will increase number of social housing units with improved energy consumption classification.</p> <p>Uncertainty</p> <ul style="list-style-type: none"> • <i>The counterfactual position?</i> • <i>Is additionality high?</i> 	<p>Common and Programme Specific outputs listed in Table above</p>	<p>Cause Effect</p> <p>Analysis to be completed once results (i.e. outputs arising) are confirmed</p> <ul style="list-style-type: none"> • <i>Increasing energy efficiency in the social housing stock will decrease carbon emissions.</i> • <i>Increasing energy efficiency of the social housing stock will lead to a decrease in the number of social housing families experience fuel poverty.</i> • <i>Increasing energy efficiency of the social housing stock will decrease the energy costs for social households will lead to more money available for other aspects of life leading to an increase in standard of living for social housing families.</i> <p>Uncertainty:</p> <ul style="list-style-type: none"> • <i>The counterfactual position;</i> • <i>The additionality of intervention</i> • <i>The wider benefits to the programme area?</i> 	<p>Result Indicators listed above</p>

The Evaluator's assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.6 Priority 5: Sustainable Urban Development

3.6.1 Development Needs

The table below shows the development needs highlighted in Priority 5 of the S&E ROP (statistics updated where possible).

Development Needs
Designated urban growth centres and gateways do not have the capacity to be effective drivers of regional and national economic development
Increased incidence of vacancy in city and town centres, population declining in several core urban areas and lack of incentives for public/private investment in revitalisation schemes
Population declining in several core urban areas and lack of incentives for public/private investment in revitalisation schemes.
The proportion of the population experiencing 2 or more deprivation indicators grew from 14% to 24.5% over the past 10 years. Many of these household are concentrated in core urban areas
Concentration of historic structures in core urban areas are an essential part of urban fabric but are in need of regeneration
Use of private cars to commute to work or school/college is at 67.7% in the S&E region an improvement (reduction) from the 2006 usage of 65.7%

The Evaluators believe that the development needs identified for this priority are grounded in the socio-economic needs for the programme area and remain relevant to the policy and operating context.

3.6.2 Investment Priority 4 (e)

Investment Priority 4(e)
Promoting low-carbon strategies for all types of territories, in particular for urban areas, including the promotion of sustainable multimodal urban mobility and mitigation-relevant adaptation measures

The socio-economic review found that the percentage of total emissions accounted for by transport had seen a small increase of 4.2%, from 11.347 million tonnes of CO₂ to 11.827 million tonnes of CO₂ in 2015. Therefore, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)
To support low carbon sustainable, multimodal urban mobility in designated urban areas.

The review has found that the strategic direction in relation to low carbon, multi-modal urban mobility has not changed since the Ex-Ante Evaluation. Therefore, the Evaluator's assessment is that this Specific Objective remains appropriate.

Result Indicators

Result indicators:
Non-private car commuting levels in the designated urban centres (Target= 42.26%, Baseline=22.26%)

Result indicators for the programme need to be specific and measurable. The Evaluator's assessment is that this indicator remains relevant.

Type of Actions

Type of actions:
<ul style="list-style-type: none">• Actions will be selected by urban authorities on the basis of a detailed specification and criteria to be prepared for the investment programme. These criteria will take account of, inter alia, the following key criteria:• Coherence with the integrated strategy submitted, including the strategic fit with national, regional and local plans and individual Urban Centre Strategies.• Quality of the selected proposal(s) in terms of social inclusion and contribution to economic development of urban centre, universal design and environmental sustainability,• Social and Economic benefits that the proposal will bring to the community and to the urban centre concerned over-and-above what is there already in terms of employment and sustainable economic development.• Value for money of the proposed actions to be supported and the expected leverage effect of additional public and private funding• Inclusiveness of the consultative process undertaken in the development of the integrated strategy and the prioritization of project actions, in terms of council and community buy-in.• Delivery arrangement including project management arrangements, milestones, targets, deadlines and outcomes.

The Evaluator's assessment is that the Actions are consistent with the Result Indicator and reflect the development needs (and the IP and SO).

Expected Outputs

Expected Outputs:
Common Output Indicators
None specified
Programme Specific Output Indicators:
Number of multimodal urban mobility projects (Target=4)

The Evaluator's assessment is that the outputs continue to be sufficient in detailing the expected outputs of the intervention under this Investment Priority.

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
Actions as listed above	<p>Cause-Effect:</p> <p>This is a straightforward cause-effect whereby an increase in the number of areas with an integrated urban development strategy will result in an increase in the level of the sustainable transport in these areas and the social infrastructure of the programme region.</p> <p>Uncertainty:</p> <ul style="list-style-type: none"> Only identified weakness relates to whether the integrated urban development strategies are able to be developed. 	Common and Programme Specific outputs listed in Table above	<p>Cause-Effect:</p> <ul style="list-style-type: none"> At present the cause effect relationship is not straightforward. Whilst the funding provided to integrated urban development may unlock and leverage further public and private investment this is not a guaranteed outcome. <p>Uncertainty:</p> <ul style="list-style-type: none"> The multiplier effect from programme support to achieve additional leveraged public and private investment. Requirements such as planning permission required from brownfields sites? 	Result Indicators listed above

The Evaluator’s assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

3.6.3 Investment Priority 6 (e)

Investment Priority 6(e)

Action to improve the urban environment, revitalisation of cities, regeneration and decontamination of brownfield sites (including conversion areas), reduction of air pollution and promotion of noise-reduction measures

The socio-economic review found that the percentage of total emissions accounted for by transport had seen a small increase of 4.2%, from 11.347 million tonnes of CO₂ to 11.827 million tonnes of CO₂ in 2015. Therefore, the evaluators are satisfied that this Investment Priority continues to relate appropriately to the identified Development Needs.

Specific Objectives

Specific Objective(s)

To revitalise, regenerate and improve the urban environment in the designated urban centres as part of integrated urban strategies.

The strategic review has found that the strategic direction in relation to carbon reduction has not changed since the Ex-Ante Evaluation. Therefore, the Evaluator's assessment is that this Specific Objective remains appropriate.

Result Indicators

Result indicators:

Improvement in the social, economic and physical conditions in selected urban centres, based upon an urban regeneration index (target = all >5.0)

Result indicators for the programme need to be specific and measurable. This indicator, whilst relevant in theory, is no longer updated in practice and therefore is no longer relevant.

Type of Actions

Type of actions:

Grant Scheme to develop urban regeneration projects which are aligned with an Integrated urban development strategy put forward by local authorities, and which may incorporate the following:

- Physical regeneration and renewal and environmental enhancement
- Support for social infrastructure, community facilities, community development initiatives and social economy undertakings
- Support for social enterprises, social economy undertakings and social innovation;
- Development and/or rehabilitation of natural, cultural and built heritage
- Provision of enhanced arts and culture facilities
- Re-development of brown-field sites and historic structures
- Sustainable urban transport projects

The Evaluator's assessment is that the Actions are consistent with the Result Indicator and reflect the development needs (also IP and SO).

The introduction of the Urban Regeneration and Development Fund (URDF) aims to support sustainable development through the regeneration of Ireland's five cities and other large towns. However, as the projects to be funded under this Priority were selected in advance, there will be no duplication with Priority 5.

Expected Outputs

Expected Outputs:
Common Output Indicators⁸⁷
Population (no.) living in areas with integrated urban development strategies (Target = 1,571,356)
Programme Specific Output Indicators:
Number of integrated growth centre strategies implemented (Target = 9)

The Evaluator's assessment is that the outputs continue to be sufficient in detailing the expected outputs of the intervention under this Investment Priority

⁸⁷ Full list of Common Output Indicators included in ANNEX I of the REGULATION (EU) No 1301/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 17 December 2013 on the European Regional Development Fund and on specific provisions concerning the Investment for growth and jobs goal and repealing Regulation (EC) No 1080/2006

Assumptions

Actions	Assumption on feasibility of achieving output from this action (cause-effect & uncertainty)	Output Indicators (Common and Programme Specific)	Assumption on contribution of Output Indicators (Common and Programme Specific) to Result Indicators (cause-effect & uncertainty)	Result Indicators
Actions as listed above	<p>Cause-Effect:</p> <p>This is a straightforward cause-effect whereby an increase in the number of areas with an integrated urban development strategy will result in an increase in the level of the population living in these areas and the social infrastructure of the programme region.</p> <p>Uncertainty:</p> <ul style="list-style-type: none"> • <i>Only identified weakness relates to whether the integrated urban development strategies are able to be developed.</i> 	Common and Programme Specific outputs listed in Table above	<p>Cause-Effect:</p> <ul style="list-style-type: none"> • <i>At present the cause effect relationship is not straightforward. Whilst the funding provided to integrated urban development may unlock and leverage further public and private investment this is not a guaranteed outcome.</i> <p>Uncertainty:</p> <ul style="list-style-type: none"> • <i>The multiplier effect from programme support to achieve additional leveraged public and private investment.</i> • <i>Requirements such as planning permission required from brownfields sites?</i> 	Result Indicators listed above

The Evaluator’s assessment is that the Intervention Logic outlined in the table above remains robust and in light of socio-economic and political / strategic context does not require amendments.

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