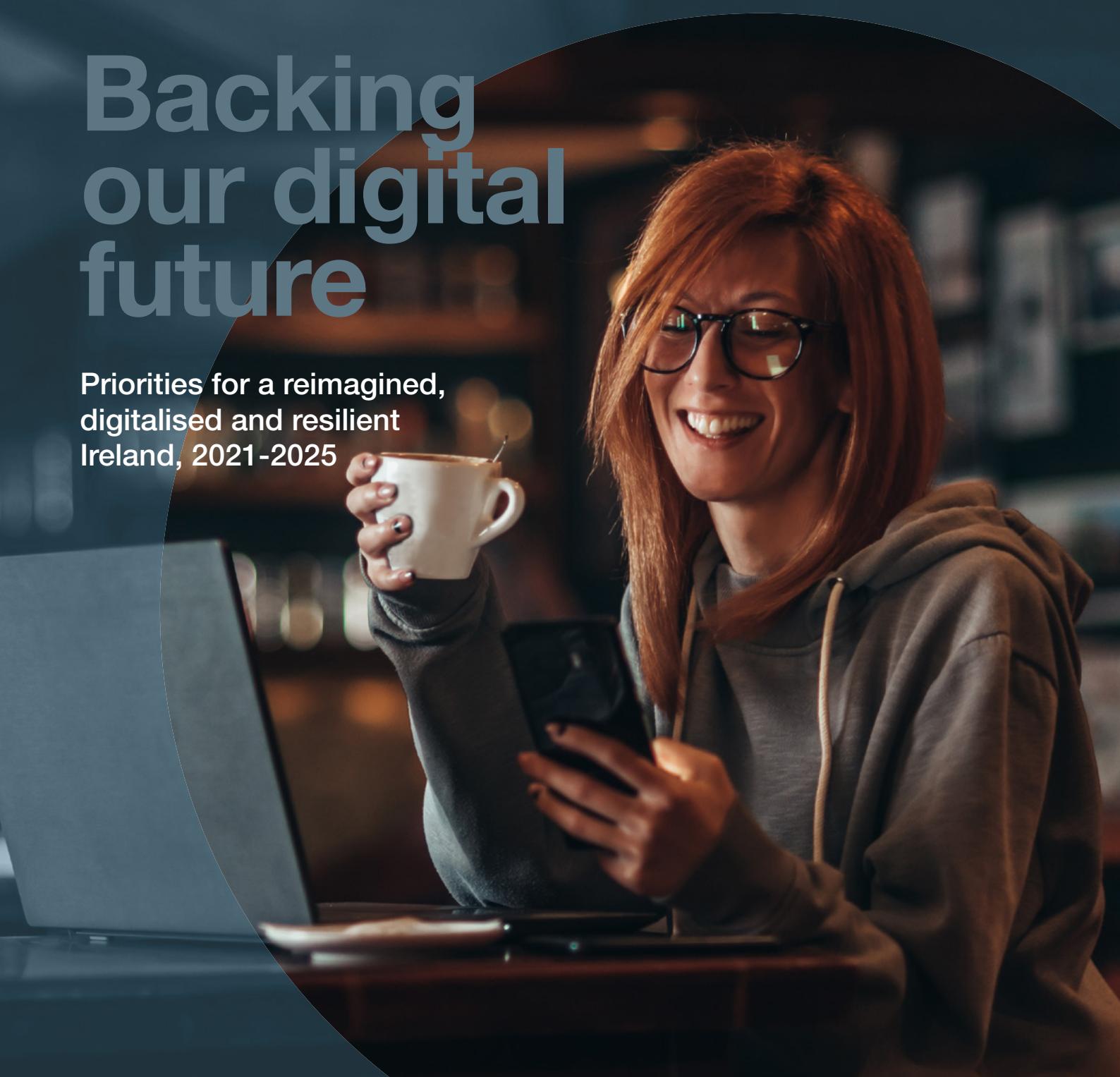


Backing our digital future

Priorities for a reimagined,
digitalised and resilient
Ireland, 2021-2025



June 2021

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Executive summary

The EU has committed to a green and digital led recovery. The Programme for Government agreed in June 2020, committed to a new National Digital Strategy and to ensuring Ireland is at the forefront of a digital future and a global leader in research and innovation (R&I). Ibec welcome these commitments. Digital readiness is essential in ensuring our economic recovery, resilience, and societal well-being. Ireland had made progress, however gaps and divides exist in our relative readiness to access and adopt existing and emerging digital opportunities for future growth and well-being. In this context, Ibec is proposing policy recommendations in four areas to Government aimed at prioritising and realising Ireland's digital opportunity.

	<p>1. Provide political leadership to prioritise, co-ordinate and realise Ireland's digital opportunity.</p>	<ul style="list-style-type: none">■ Establish 'centralised governance' to support digital policy leadership and coherence. Establish leadership and co-ordination centrally, through the Department of An Taoiseach, over the development and implementation of digital policy, including a new national digital strategy and digital aspects of national economic planning.■ Establish a centralised digital and data affairs forum, co-ordinate governmental and non-governmental stakeholders, deliver and drive a shared vision that ensures Ireland is at the forefront of a digital and innovative future.■ Deliver roadmaps on national digital transformation, signal ambition and further opportunity for business, public services, and individuals.■ Embrace Ireland's role in EU digital regulation and shape evolving EU digital and data policy conditions, enable growth and well-being.■ Lead on enhanced Government and public services, provide a catalyst for growth.
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	<p>2. Sustain trust online. Invest in national cybersecurity and data protection capacities. Safeguard business, services, and individuals online.</p>	<ul style="list-style-type: none">■ Ensure national cyber security and data protection capabilities are adequately resourced and that Ireland plays a strong role internationally in understanding and managing evolving cyber threats.■ Engage, co-ordinate and strengthen our cyber security ecosystem.■ Use trusted data and digital tools to protect public health.
	<p>3. Support essential 21st century enterprise infrastructure. Enable further opportunity for government, business, and individuals.</p>	<ul style="list-style-type: none">■ Promote conditions that further enhance secure connectivity. Enable further opportunity and resilience for everyone.■ Boost national R&D capabilities in digital and data innovation. Position Ireland to realise emerging opportunities.■ Intensify digitally enabled entrepreneurship, innovation, and absorptive capacity across enterprise e.g., manufacturing and supply chains; start-ups and SMEs; experience economy; and Fintech. Support quality jobs, economic growth, and resilience.
	<p>4. Foster digital inclusion, skills, and talent necessary for further growth and well-being.</p>	<ul style="list-style-type: none">■ Deliver and resource new national literacy strategy. Promote digital literacy, inclusion, and skills.■ Invest, promote, and provide access to the necessary digital skills that enable organisations, educators, and individuals to engage and succeed in a more digitalised Ireland.■ Resource and continue reform of visa and work permit processes. Attract and retain mobile digital talent.

Ireland needs to be at the forefront of a digitalised future

Digital readiness is essential, not optional in ensuring our economic recovery, resilience, and societal well-being. Ireland had made progress in its digital development going into the pandemic crisis. However, gaps and divides exist in our relative readiness to access and adopt existing and emerging digital opportunities for future growth and well-being.

Challenges arose for some in accessing digital opportunities, during the pandemic and the attainment of digital skills and bridging regional digital divides have grown in importance. Increased reliance on the online environment has driven the recognised need to preserve trust and protect our essential services, businesses, and people online. Finally, this pandemic has shown the value of government, agencies, businesses, and citizens working together, both at home and internationally, to drive positive change in difficult times.

Our economic future is intrinsically linked to the ability of our health and wider governance systems to confidently model and plan for the re-opening and reinvigoration of the country, and robust enough for the potential re-emergence of such emergencies in the future. Trustworthy digital tools and data, used in conjunction with a suite of other health measures, offer the opportunity to assist Ireland in transitioning from the pandemic to quality jobs and enhanced well-being.

Evolving governance on taxation, digital and growing international competition could impact our future growth. We must reimagine and develop capacities, institutional and physical infrastructure that enable our businesses and people to succeed in the 21st century.

Digital readiness is a strategic cross-sectoral issue. Ireland already has a unique cluster of high-value knowledge firms, across many sectors, with a wealth of research and talent. In 2019, there were over 248,000 employed in ‘digitally intensive’ sectors in Ireland. Ibec research indicates a business move towards more online sales (31%), coupled with greater use of remote working (73%) and increased investment in technology (42%), pointing to a more permanently digitalised way of conducting business into the future. This strong position should be leveraged to realise further digital opportunities across our economy including our government and public services, manufacturing, financial services, SMEs, experience economy and our healthcare ecosystem to create a sustainable recovery, quality jobs and enhanced well-being.

At EU level, the European Commission has committed to a green and digital led recovery. The Programme for Government agreed in June 2020, committed to a new National Digital Strategy and to ensuring Ireland is at the forefront of a digital future and a global leader in research and innovation (R&I). Ibec welcome these commitments. We must work together to lock-in positive digital developments and address challenges to accessing and adopting further digital opportunities. In this context, Ibec is proposing a series of policy recommendations to Government aimed at prioritising and realising Ireland’s digital opportunity in the period, 2021-2025.

This paper outlines four main areas for intervention by Government:

- 1. Provide political leadership** to prioritise, co-ordinate and realise Ireland's digital opportunity.
- 2. Sustain trust online.** Invest in national cybersecurity and data protection capacities. Safeguard our businesses, services, and individuals in creating and realising digital opportunities.
- 3. Support conditions for further digital infrastructure, innovation, and entrepreneurship.** This is essential 21st century enterprise infrastructure. Enable further opportunity for government, business, and individuals.
- 4. Foster digital Inclusion, skills and talent** for further growth and well-being.



Four policy asks to Government

1. Provide political leadership to prioritise, co-ordinate and realise Ireland's digital opportunity.

The challenges

- There are 11 government departments and 11 statutory bodies, with individual plans and initiatives, who with EU partners, influence the direction and pace of our digital readiness and the regulatory structures on which it relies. There are dependencies between existing and expected 'decentralised' digital strategies. In addition, our broader policy ambitions in healthcare, education, innovation, and sustainability have dependencies on enhanced digital and data infrastructure. The EIB (2019), while acknowledging the benefits of these governmental initiatives, note that they "are not fully coordinated between government entities and are not embedded in a holistic national digital strategy (NDS)." Ireland's current NDS, established in 2013, is narrow in scope and a promised update is overdue.
- Evolving international digital and data policy conditions impacts an ever broader spectrum of economic activity and will shape our future growth and well-being by reshaping the governance of data innovation, data flows, emerging digital technologies, digital services, and taxation.
- Ireland is ranked #9, above the EU28 average in digital public services. While progress is being made, international comparisons carried out by the European Commission, InCiSE and the Irish OGCIO indicate that there is more to do in further developing our digital public services.

Policy solutions

- (i) Establish 'centralised governance' to support digital policy leadership and co-ordination. Establish leadership and co-ordination centrally through the Department of An Taoiseach over the development and implementation of digital policy, including a new national digital strategy and digital aspects of national economic planning. This would:
 - **Provide thought leadership and a resourced interdepartmental structure for the co-ordinated development and implementation of digital and data policy** at national and particularly EU level that sustains a positive investment climate and supports national economic goals.
 - **Position digital policy as a key pillar of national economic recovery planning** to fuel the next generation of Irish digitalised businesses and inward investment.
 - **Co-ordinate relevant governmental and non-governmental stakeholders to deliver a new National Digital Strategy and digital aspects of a new national economic plan.** Lock-in positive developments in digital innovation, address challenges and carry shared priorities forward on enhancing the digital readiness and resilience of government, public services, businesses, and citizens.
 - **Ensure there is a visible focus on Ireland's digital opportunity.** Ensure political prioritisation, ownership and a whole of government approach to the co-ordination and delivery of sectoral policies and initiatives related to further national digital transformation and data innovation in accordance with OECD recommendations. This should also provide a necessary audit function whereby all policy areas are examined through the digital affairs lens.

- **Establish a centralised digital and data affairs forum**, to lead and co-ordinate governmental and non-governmental stakeholders and deliver and drive a shared vision that ensures Ireland is at the forefront of a digital and innovative future. Such fora exist in other digital frontrunner countries.

(ii) Deliver roadmaps on national digital transformation, signal ambition and further opportunity for business, public services, and individuals.

Enable further digital opportunity across our government, public services, business and for individuals.

- **Deliver, resource and implement an updated National Digital Strategy (NDS) and digital aspects of a new national economic plan**, provide a coherent vision across sectoral policies and initiatives to position Ireland to maximise economic and societal benefits from further digitalisation.
- **Deliver, resource, and implement a National AI Strategy. Establish a time-bound artificial intelligence (AI) advisory council of relevant stakeholders to support government as part of the national economic recovery**. Trustworthy AI is recognised by the EU and OECD as a strategic technology stream for enabling future economic growth and well-being.

(iii) Embrace Ireland's role in EU digital regulation. Shape evolving EU digital and data policy conditions, enable growth and well-being.

Intensify work with partners in the EU, OECD, and agencies to:

- **Shape an open, fair, market-friendly digitalised Europe**, based on evidence-based and coherent policy making, that delivers quality jobs, services, and enhances well-being.
- **Ensure digital tax proposals continue to be progressed through the multilateral OECD framework and a firm stance is taken against unilateral proposals**. Attract and retain FDI.
- **Deepen relations with like-minded digitalised nations within the framework of the 'D9+ grouping'**, to develop mutually beneficial agreed positions.
- **Embrace Ireland's role in EU digital regulation, build up regulatory expertise and lead on digital policy issues at EU level**. Ireland plays an increasingly important role in the European digital regulatory framework and should leverage this expertise in relevant EU and international regulatory discussions. This will require Ireland to enhance its regulatory capacity to match its role and provide for a robust and predictable regulatory environment.
- **Ensure the free flow of data.**
 - Prioritise a new EU-US adequacy decision with the new US administration. Ireland should intensify work with partners to promote a new and resilient transatlantic relationship on further digital and data innovation.
 - Finalise a new EU-UK mutual adequacy decision in a future relationship post-Brexit. Ireland should use our shared island status, in working with partners, to ensure the post-Brexit relationship enables continued data flows, digital innovation, and trade.
 - Support public and private organisations in the continued use of alternative safeguards for the transfer of personal data from the EEA to third countries. Ensure workable guidance for the use of alternative safeguards is provided to data exporters and importers. Ensure coherence between updated SCCs and regulatory guidance. Ensure regulators have adequate resources in both supporting organisations and enforcement.

(iv) Lead on enhanced Government and public services, provide a catalyst for growth.

- **Act on the Cruinniú GovTech report findings;** for enhanced public services and a catalyst for broader economic growth. Lead and invest in accessible online Government services and the inclusive digitalisation of public service delivery for organisations and citizens. Establish an enhanced cloud computing and digital services procurement framework. Address any administrative barriers to procurement in digital services, including Cloud. Provide a catalyst for further growth with economic and societal benefits.
- **Promote further public awareness of the benefits of digitalised government and public services;** encourage further digital adoption and inclusion.
- **Foster further digital talent across government and public bodies;** develop digital skills and attract mobile digital talent to public bodies. Intensify the pipeline of Irish talent entering the EU institutions. Shape the future.
- **Further develop a secure national digital credentials ecosystem,** through public-private collaboration. Self-sovereign identity management can enhance trusted interactions between government and public services, businesses, and people. McKinsey (2019) research indicates that countries that implement digital identity systems could unlock value equivalent to 3-13% of GDP by 2030. Deliver a digital COVID-19 certificate for travel.



2. Sustain trust online. Invest in national cybersecurity and data protection capacities. Safeguard business, services, and individuals online.

The challenges

- Trusted digital services, adequate data privacy and security underpins any competitive economy and society in the digital era, and it is an important consideration in securing further inward investment. Ireland also plays an important European regulatory role in digital and data.
- The workplace upheaval caused by COVID-19, resulted in a rise in attempted and successful cybercrime.

Policy solutions

- (i) Ensure national capacities in data protection and cyber security are adequately resourced and implemented. Protect services, businesses and citizens online.
 - **Support the uptake of trustworthy data-driven solutions**, by protecting people's privacy, security, and safety as they connect from home and as governments and healthcare authorities fight the spread of disease.
 - **Ensure national digital regulatory capacities are adequately resourced and implemented.** Ensure national cyber security and data protection authorities, capabilities and initiatives are adequately resourced. Resource the necessary institutional infrastructure and capacities for the implementation of expected EU rules on digital services and digital markets.
 - **Resource and implement the National Cyber Security Strategy (NCSS).**
 - **Engage, co-ordinate and strengthen our cyber security ecosystem.** Encourage a pipeline of the relevant knowledge, skills, and talent in the State. Enhance national cyber security and resilience and support the positioning of Ireland as a lead player in the cyber security industry.
 - **Intensify outreach and work with international partners to shape the response to an ever-changing cyber threat and governance environment.**
 - **The role of the National Cyber Security Centre (NCSC) is increasingly vital to the security and safety of key infrastructure and intangible national assets as global cyber-attacks evolve in sophistication and scale.** Adequate resources and emphasis on future threats must be the key focus.

- (ii) Use trusted data and digital tools to protect public health.

- **Use trusted technology responsibly, in conjunction with a suite of other health measures.** Develop Ireland digital healthcare opportunity. Use data to help public health authorities make informed and effective decisions on healthcare policy and capacity needs. Empower citizens, aid the understanding and treatment of disease, target the delivery of vital healthcare resources, ensure that the channels for this delivery are safeguarded and recognised by public health bodies, save lives, and ultimately help people transition safely back to work and travel.
 - **Increase adoption of telehealth and innovative healthcare technologies:** There is a growing interest in how telehealth aspects of a product /service offering can be leveraged by hospitals/ clinicians. Telehealth can play an important role of treating patients in a non-hospital setting contributing to improved patient outcomes.

3. Support conditions for further digital and data infrastructure, innovation, and entrepreneurship. This is essential 21st century enterprise infrastructure. Enable further opportunity for government, business, and individuals.

The challenges

- Secure digital and data infrastructure can enable digital readiness, opportunity, and resilience for everyone. Access to digital and data infrastructure is key to bridging digital divides in our economy and society; enhancing services and ensuring our regions develop and nurture the next generation of indigenous start-ups and SMEs.
 - Broadband provision in Ireland is challenging due to our much-dispersed population, which combines a high proportion of rural dwellers with low population density. Although significant investment and progress are being made, Ireland has more to do in developing its connectivity. Successful rollout of the National Broadband Plan (NBP) intervention's ambition is essential to further regional development and opportunity.
 - 5G promises major advances in agriculture, education, healthcare, manufacturing, retail, and transport. Amárach Research (2020) estimated that the opportunity cost of low 5G adoption in Ireland is a loss in GDP of €6.1BN by 2025, rising to €20.9BN by 2035. Addressing disinformation, the timely availability of spectrum and access to sites and to public land are important to 5G roll-out.
 - Cloud computing offers enormous opportunities in terms of cost efficiency, security, flexibility, and ease of scaling, especially important to SMEs and digitised public services.
 - Enhancing national RDI capabilities can position us to realise emerging digital opportunities.
 - While progress has been made in supporting the digital transformation of SMEs and industry, studies indicate that there is room for further enhancing digital adoption, entrepreneurship, and innovation across Irish enterprise. According to the EU Digital Economy and Society Index (DESI) report 2020, Ireland ranks 6th out of the then 28 EU Member States. Over the last five years, Ireland has moved up the rankings, relative to overall level of digitisation of the economy and society, but a focus on infrastructure, innovation and entrepreneurship will enable continued comparativeness.

Policy solutions

- (i) Promote conditions that further enhance secure connectivity. Enable further opportunity and resilience for everyone.
 - **Ensure the rapid rollout of the National Broadband Plan.** Enhance connectivity, inclusion, and regional development. Address obstacles to the speedy rollout of telecommunications infrastructure, so networks are improved, and fibre broadband is delivered as rapidly as possible.
 - **Create a supportive regulatory environment for the roll-out of 5G,** an important technology for enhanced connectivity, growth, and well-being. Introduce incentives such as exemptions from development contributions for 5G infrastructure to support faster private sector deployment.
 - **Reconvene Government's mobile phone and broadband taskforce,** focus on the removal of administrative, planning, and regulatory obstacles to the deployment of telecommunications infrastructure.
 - **Address mobile blackspots:** Explore scope for State and industry collaboration to address mobile blackspots in rural areas.
 - **Refine the Strategic Infrastructure Development (SID) process to fast-track planning for infrastructure.** Amend the SID legislation to make timelines more predictable; and simplify further information requests.

- **Introduce legal reforms to enhance efficiency in planning process.**
- **Extend the SEAI Accelerated Capital Allowance** to approved energy efficient 5G and wireless technology equipment.
- **The National Recovery and Resilience Plan should specifically recognise the role of the digitalised economy in Ireland's economic recovery.** In line with the EU's Recovery and Resilience Facility, sustainable policy solutions should place an added emphasis on digital and green transitions.

(ii) Boost national R&D capabilities. Position Ireland to realise emerging digital opportunities.

- **Develop, deliver, and resource a new national innovation strategy**, to succeed Innovation 2020. Ensure stronger collaboration between government, industry, and the research ecosystem.
- **Recognise and promote innovation through increased public investment.** Deliver a new multiannual funding programme for research infrastructure.
- **Leverage the Disruptive Technologies Innovation Fund**, reflect the need to realise emerging digital opportunities in future calls.
- **Develop, deliver, and resource a plan to intensify our international engagement and collaboration in R&DI and standardisation.** Shape and create strategic opportunities in emerging fields. Build Ireland's capacity to leverage Horizon Europe and Digital Europe funding.
- **Develop a research centre of excellence for data governance.** Ensure strong collaboration between industry, academia, government, and agencies.
- **Create a network of Digital Innovation Hubs and incubation centres**, support our enterprise and public sector to develop and adopt emerging digital and data opportunities.



(iii) Intensify digitally enabled entrepreneurship, innovation, and absorptive capacity across enterprise.
Support quality jobs, economic growth, and resilience.

■ **Engage and encourage business, large, small and start-up, in further digital transformation.**

The pandemic has highlighted the need for enterprise to be digitally agile.

- Implement OECD recommendations on assisting the digital transformation of SMEs.
- Explore potential for enhanced voucher schemes to further support our digital economy. Examples exist in Sweden and Denmark.
- As recommended by the SME Taskforce in its report on the National SME and Entrepreneurship Growth Plan, the Government should:
 - create a single sectoral online hub and agency point for all SME supports, information and entrepreneur/SME collaboration.
 - Facilitate SME to SME and MNC to SME collaboration on how digital tools can help SMEs grow.

■ **Grow Ireland's significant Fintech opportunity.**

- Establish a Fintech Forum, without delay:
 - Engage industry and drive momentum. Develop political understanding of the fintech sector and Ireland's opportunity.
 - Identify where competing jurisdictions are winning investment and supporting Fintech growth ahead of Ireland - and then address those gaps.
- Enhance the CBI (Central Bank of Ireland) authorisation process for licenses.
- Employ fintech technology and tools in Government to support public services provided to citizens.

■ **Support digital transformation in high-value manufacturing and its supply chains for quality jobs.**

- Introduce accelerated capital allowances for several areas of advanced manufacturing (including computerised/computer aided machinery and robotic machines). Ireland has the second lowest density of industrial robots in the EU15, despite them being strongly linked with increased productivity.
- Invest in strategic infrastructure that supports Advanced Manufacturing: Support understanding, technology diffusion, skills and training development and research commercialisation to enhance innovation and employability across the sector.
- Resource and implement the national Industry 4 strategy 2020-2025. Establish meaningful mechanisms to engage stakeholders and ensure delivery of that national strategy.
 - Establish new co-ordination mechanism to ensure coherence and optimal delivery of R&DI supports for advanced manufacturing and enable further planning by government departments, agencies, and industry on how best to address digitalisation challenges for Irish manufacturing and their supply chains.
 - Focus on our comparative advantages, engage industry, and establish a stakeholder forum to engage, oversee and add momentum to the implementation of the Strategy.
 - Incentivise manufacturing enterprises to engage in upskilling programmes to ensure employees have a greater knowledge of new methods for analysing and adapting processes and to drive a digital implementation strategy.

4. Foster digital inclusion, skills and talent necessary for further growth and well-being.

The challenges

- Digital inclusion matters to social inclusion and further opportunity. Inequalities between those who have and those who do not have access and the ability to use digital tools, may compound social inequalities. Ensuring good levels of basic overall digital skills or ‘digital literacy’ across the population is crucial.
 - The European Commission (2020) and NESC (2021) have highlighted a need to enhance basic digital skills in Ireland. Accenture (2020) estimate that ‘at least 25% of the Irish population is excluded from an increasingly digital society because of socio-economic reasons’.
 - The lifelong learning participation rate in Ireland is 12.6% vs. 11.3% in EU28 (Solas, 2020). However, Ireland remains below the benchmark for lifelong learning set by the EU and behind other European digital frontrunners (Eurostat, 2020).
- Digital talent matters to enabling further economic development, improved services, and resilience.
 - Demand for ICT specialists and advanced digital skills remains a key priority for both SMEs and large firms across Ireland.
 - Demand is strong, it is not restricted to the ICT sector and has exceeded previous projections.
 - We cannot be complacent in our effort to match our skills supply to demand. There is a need to upskill Ireland’s workforce in response to ongoing digital transformation.

Policy solutions

- (i) Invest, foster, and attract necessary digital talent; enable everyone to gain the necessary skills and realise their potential in a digitalised recovery.
- **Deliver and resource new national literacy and numeracy strategy. Promote digital literacy and skills**, promote inclusion and awareness of the opportunities presented in a more digitalised Ireland.
 - **Invest, promote, and provide access to the necessary digital skills that enable organisations, educators, and individuals to engage and succeed in a more digitalised Ireland.**
 - Invest in digital education capacity. Help educators and students to adopt remote learning; ensure that lack of access to technology does not exacerbate inequality amongst learners.
 - Intensify efforts to promote STEM skills from primary level. Implement the STEM Education Review Policy Statement (2017 -2026) and increase the ambition and resources in the rollout of the Leaving Certificate computing curriculum.
 - Expand provision for technology programmes in higher education.
 - Provide alternative pathways for attaining digital skills, including apprenticeships from level 6 to 9.
 - Refine employment activation measures to facilitate digital upskilling and to bridge digital divides.
 - Incentivise lifelong learning through career guidance services, course design and supports. Encourage upskilling and continuous learning in digital skills through Skillnets.
 - **Resource and continue reform of visa and work permit processes.** Attract and retain mobile digital talent.
 - **Recognise and support key industry led upskilling initiatives** being rolled out across the country.
 - **Collaborate with industry to identify digital jobs of the future** and provide open-source learning platforms to enable upskilling opportunities similar to other member states (for example, Germany, <https://ki-campus.org/>.)

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